Mississippi Management and Reporting System

Department of Finance and Administration

MMRS MASH/Training Materials		
8202	LSO Training Coordinator Guidelines	Date Revised: 08/07/2017
		Version: 3

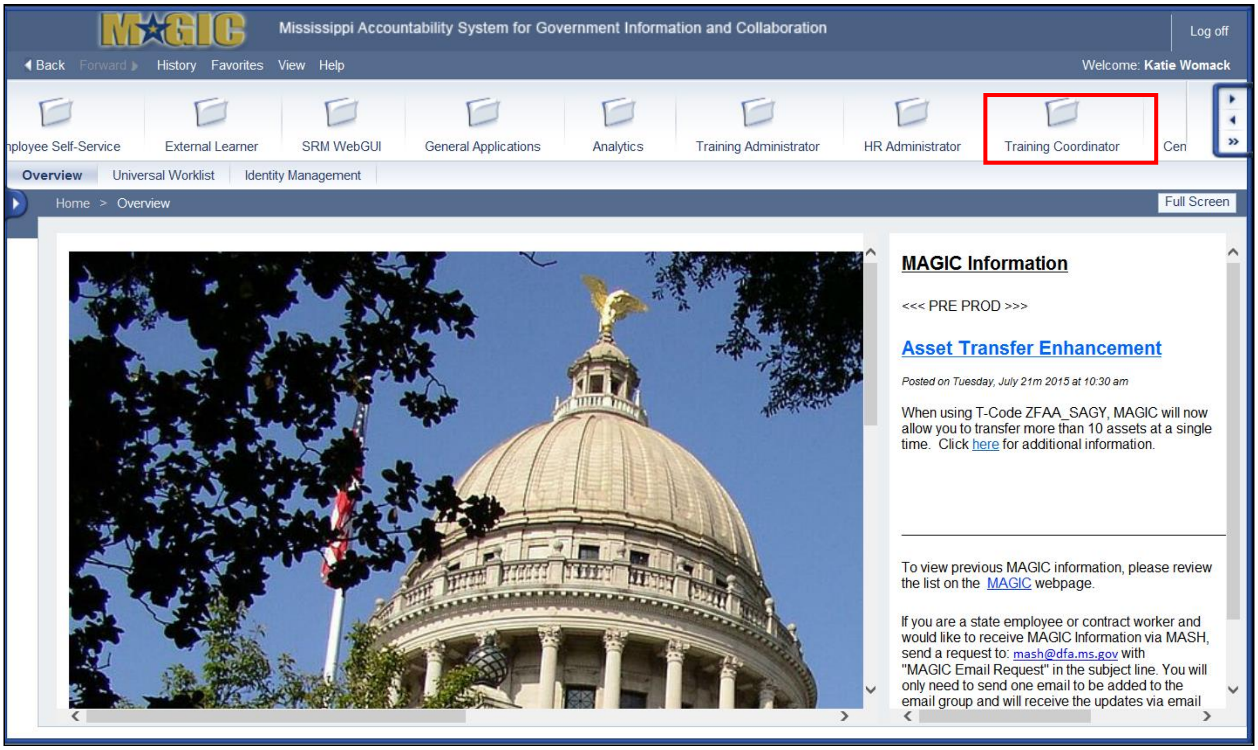
Table of Contents

Magic Portal Logon Information

The website address used to access MAGIC is: https://portal.magic.ms.gov/irj/portal.
Note: If you have difficulty with viewing the training course, please review *MAGIC Technical Requirements* on the MMRS website for compatibility issues.

If you have problems with your password, call the MMRS Call Center at 601-359-1343.
Select Option 1 (Security) Sub-option 1 (MAGIC).

Once you log into MAGIC the following screen will appear.

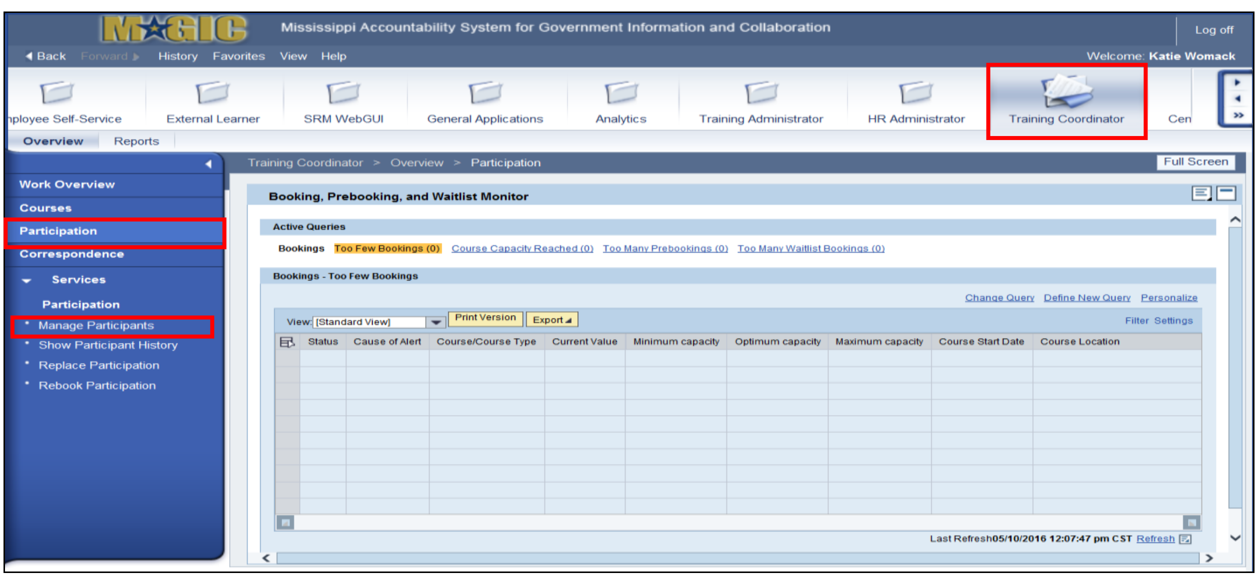


Book an Employee in Course

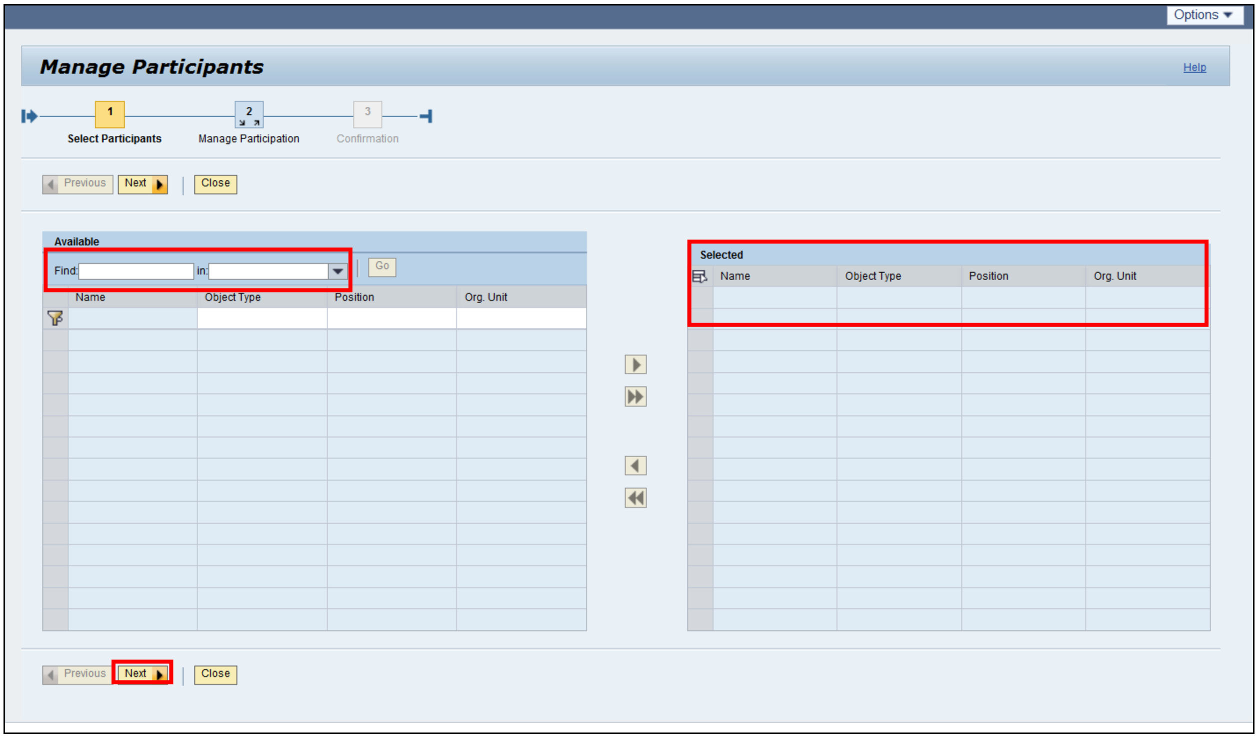
As your Agency's Training Coordinator, you will have the ability to directly book one or more of your employees into training sessions.

NOTE: Participants can only sign up for one occurrence of a course; they cannot choose several occurrences at the same time.

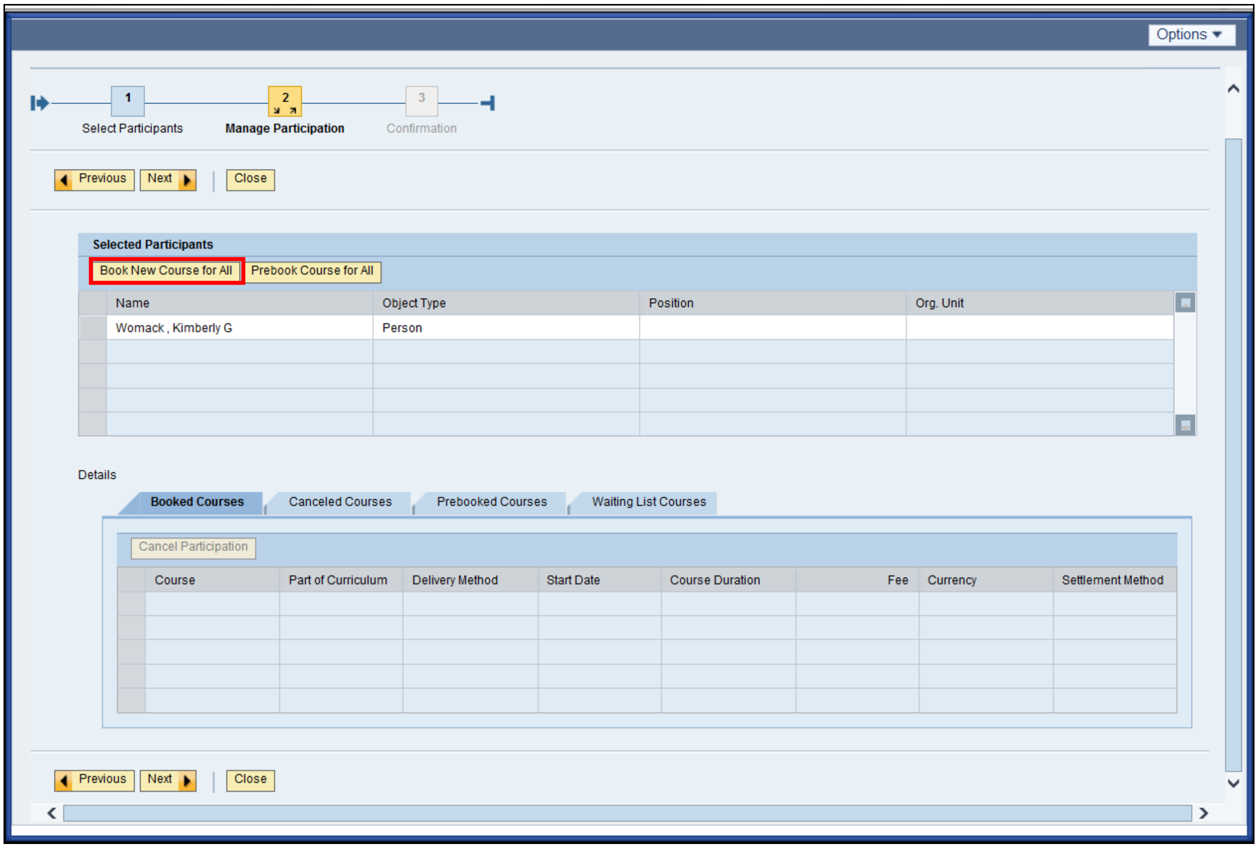
Your Action…	System Response…
1. Select the **Training Coordinator** tab.	The Work Overview screen will appear.



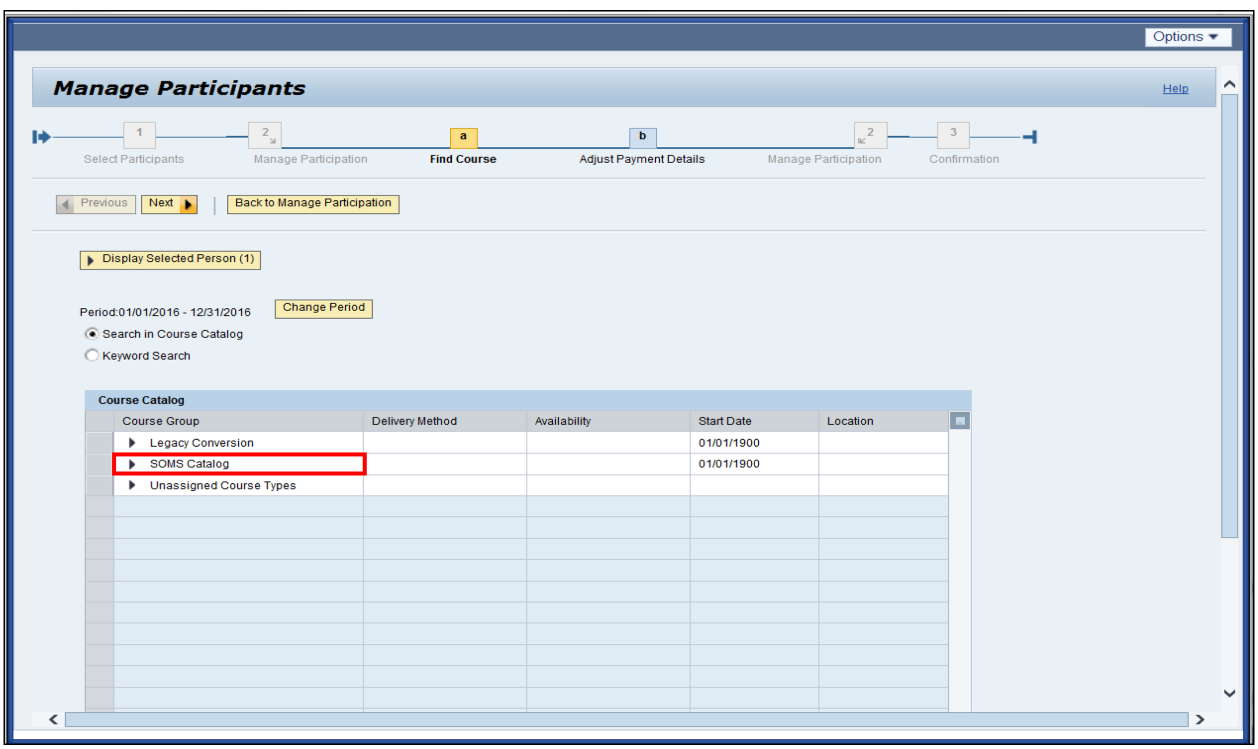
Your Action…	System Response…
2. Select the **Participation**.	
3. Select the **Manage Participants**.	The Manage Participants screen will appear.



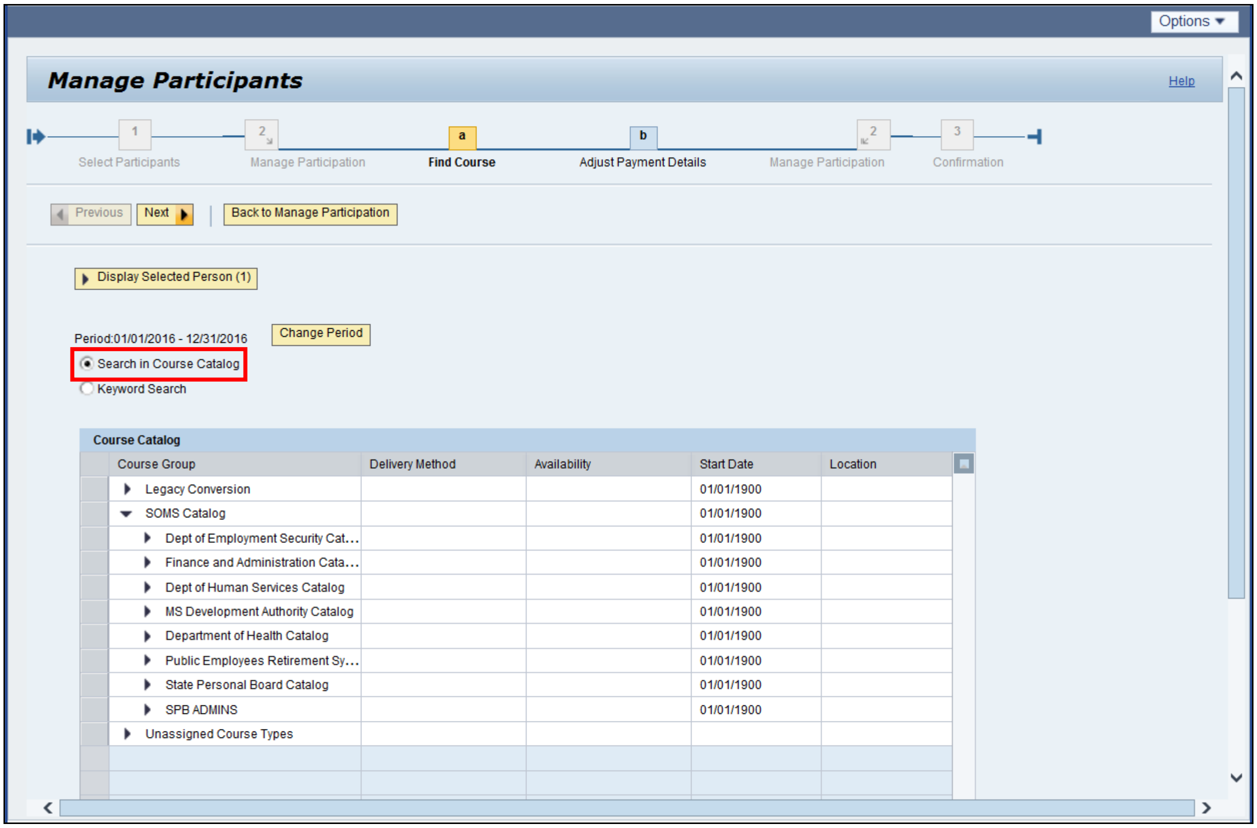
Your Action…	System Response…
4. Type your employee's last name in the **Find** box to search for the employee(s) you would like to book for a training course.	
5. Select **Organizational Unit**, **Job**, **Position** or **Person** from the drop down menu under the **IN** space. **NOTE**: To enroll all of your employees, place your org unit number in the "Find "field and select your "Organization Unit" from the drop down menu.	
6. Select **GO**.	The requested information will be returned.
7. Highlight the employee from the **"Available"** box and select the arrow to insert employee into the **"Selected"** box.	
8. Select "**Next**" at the bottom of the screen.	The following screen will appear.



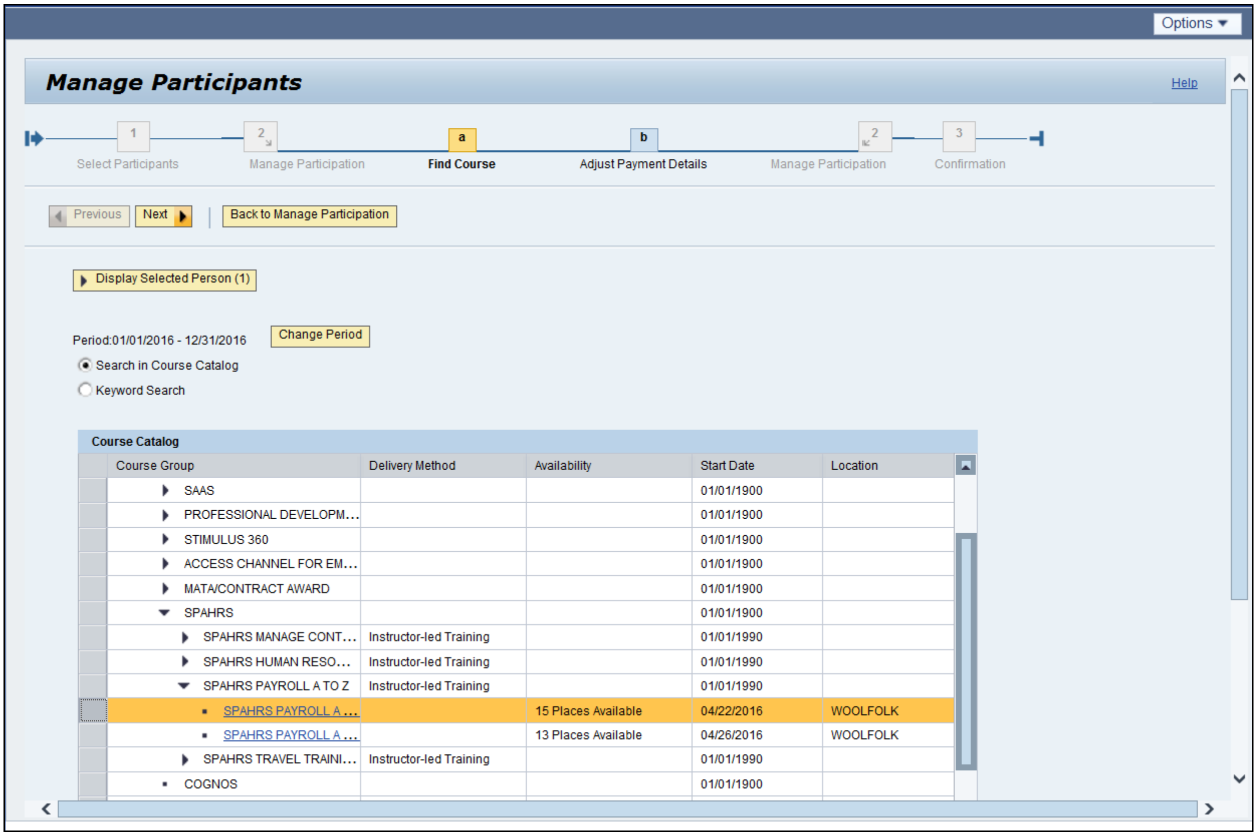
Your Action…	System Response…
9. Select the **Book New Course for All**.	The course Catalog screen will appear.



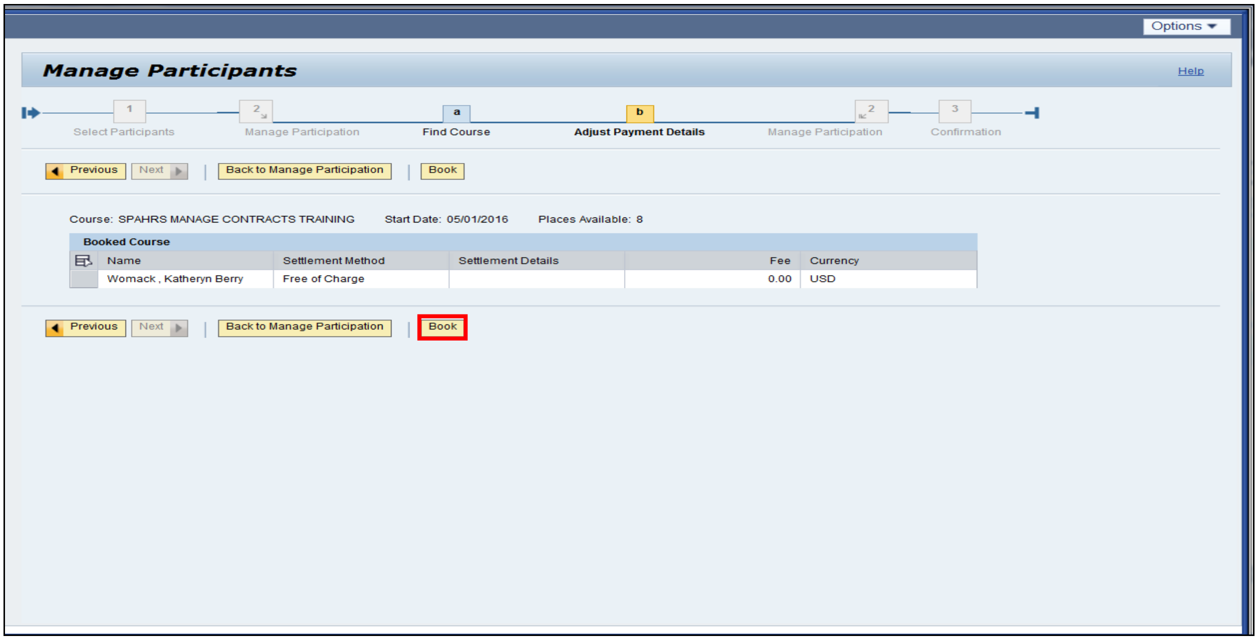
Your Action…	System Response…
10. Select the **SOMS Catalog**.	A list of agencies providing training will appear.



Your Action…	System Response…
11. Locate the agency providing the training course.	A list of training Course Groups will appear. Browse the Course Catalog for the course, or select the radio button for “Keyword Search.” The results of your search are displayed in a window on the same screen.



Your Action…	System Response…
12. Select the box next to the Course and training date you would like your employee(s) to attend.	The course is highlighted.
13. Select **Next**.	A cost summary of the course screen will appear.



Your Action…	System Response…
14. Select **Book**.	Participation was successfully booked message will appear at the top left of the page.
15. Select **Next** to finalize the booking.	The "What would you like to do next?" screen appears. At this point you may add more people by clicking on the link to "Select more People to Manage Participation."
16. Select the **Close**.	

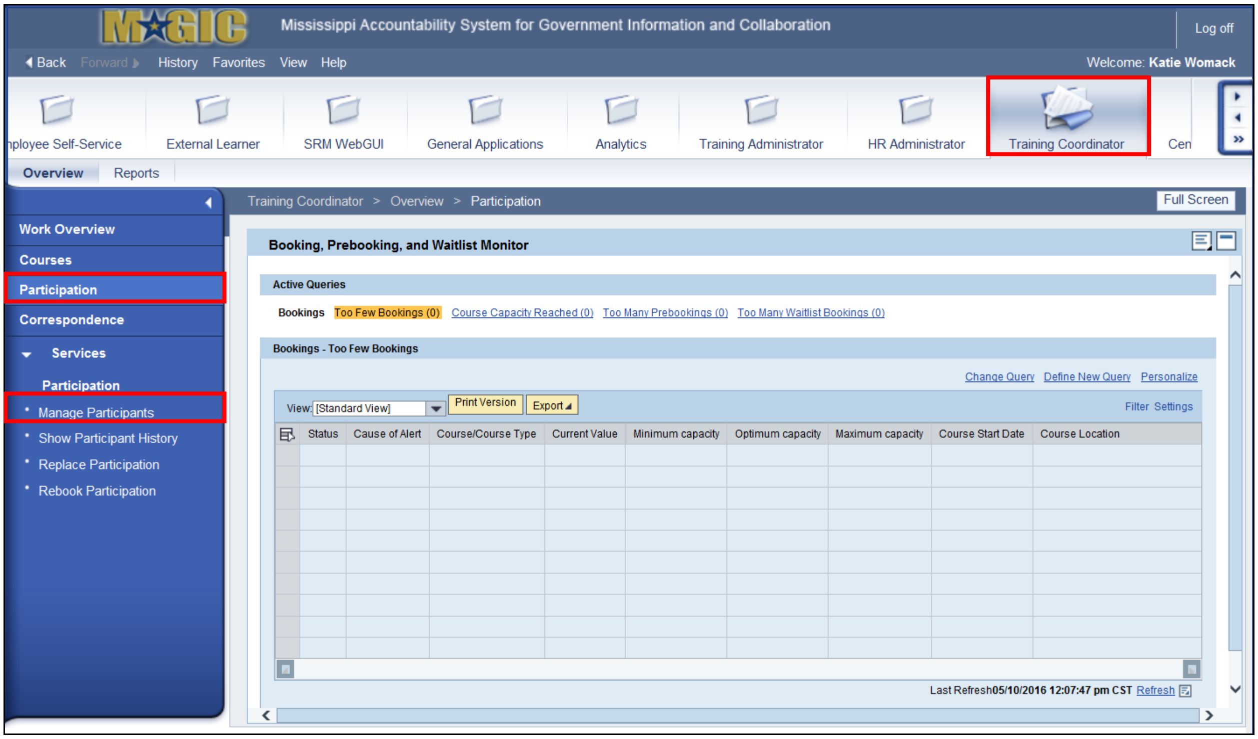
Prebook an Employee in Course

Prebooking can be used if there are not any courses scheduled or if the scheduled dates are not convenient. Prebooking is expressing interest in attending a course at a later date.

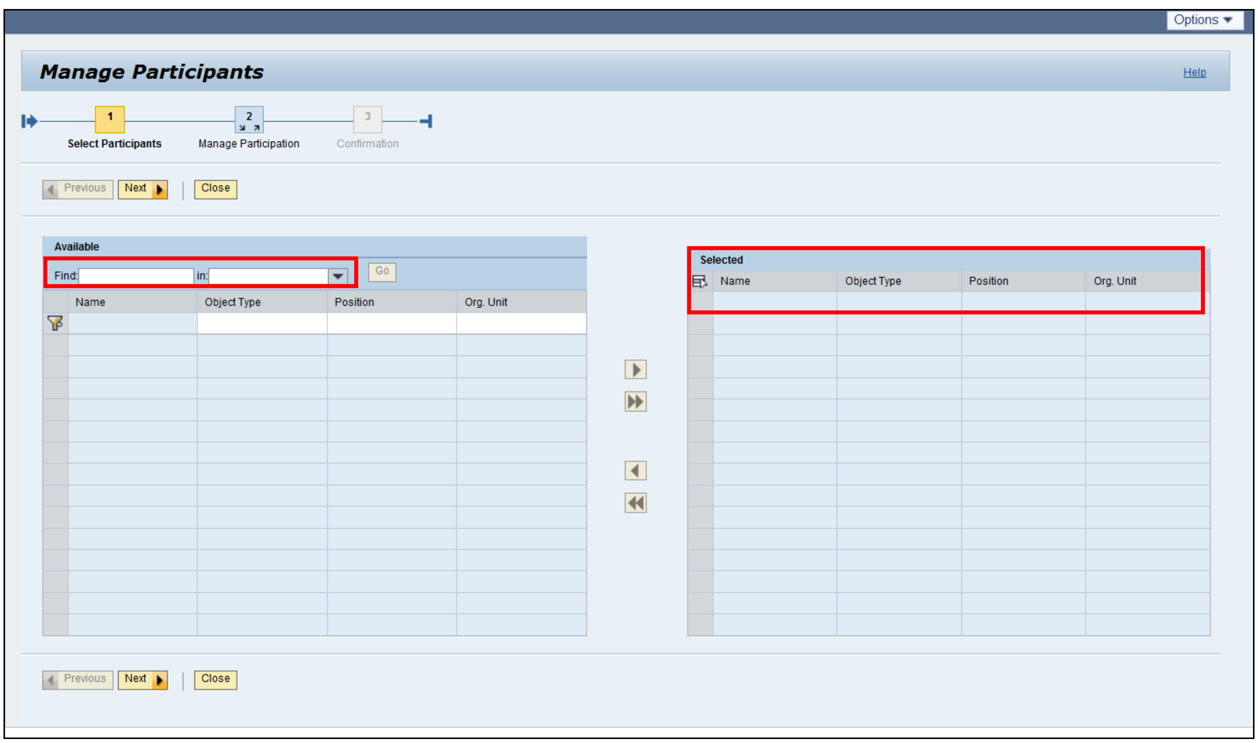
Courses that meet your employees' prebooking criteria will appear in their **Messages and Notes** section when they are scheduled. Employees can book themselves in those courses at that time by selecting the course title or date link for the session they wish to attend and following the standard booking procedure from the "8203 LSO Employee Self Service Guidelines" located on the MMRS website under LSO Training Materials. Only one prebooking may exist for a given course in a specified time period. Their Prebook lists will reflect the most recent data entered.

NOTE: Participants can only sign up for one occurrence of a course; they cannot choose several occurrences at the same time.

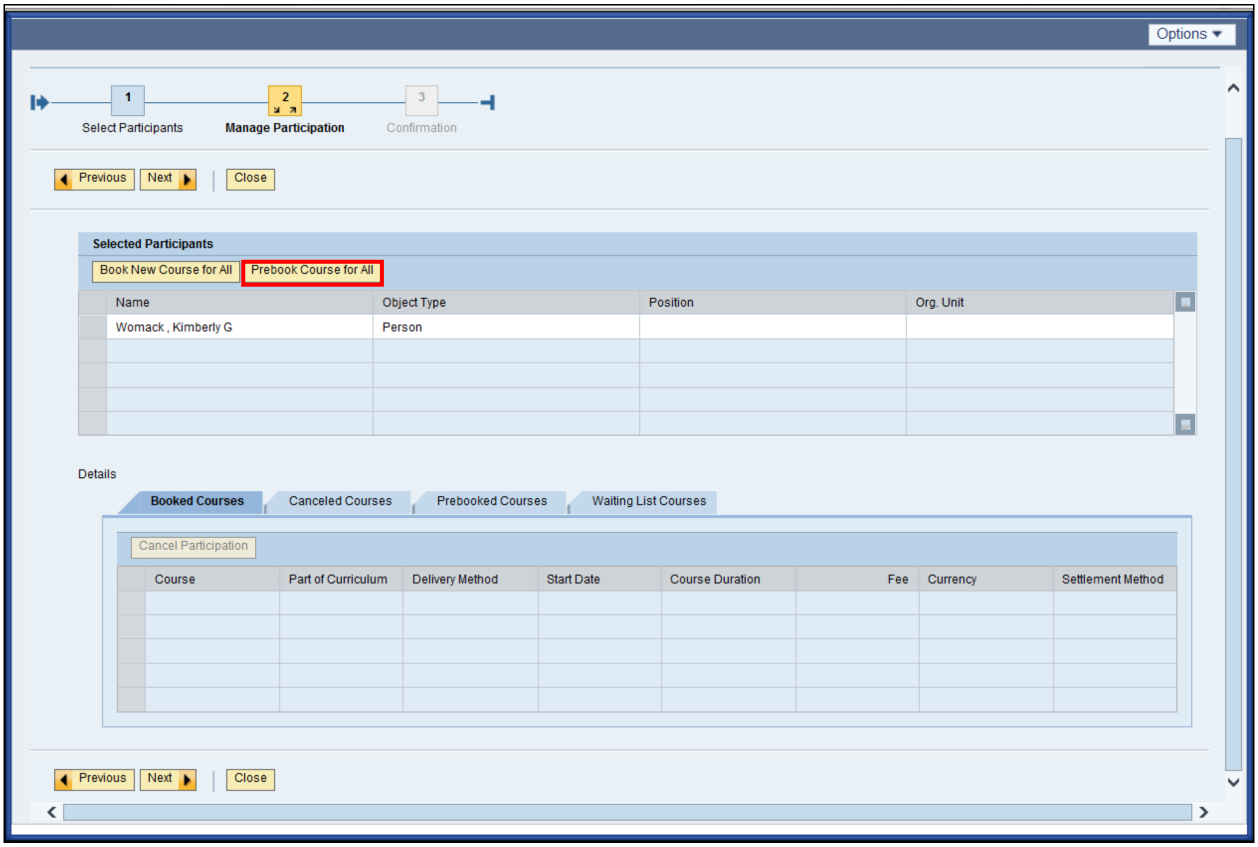
Your Action…	System Response…
1. Select the **Training Coordinator** Tab.	The Work Overview screen appears.



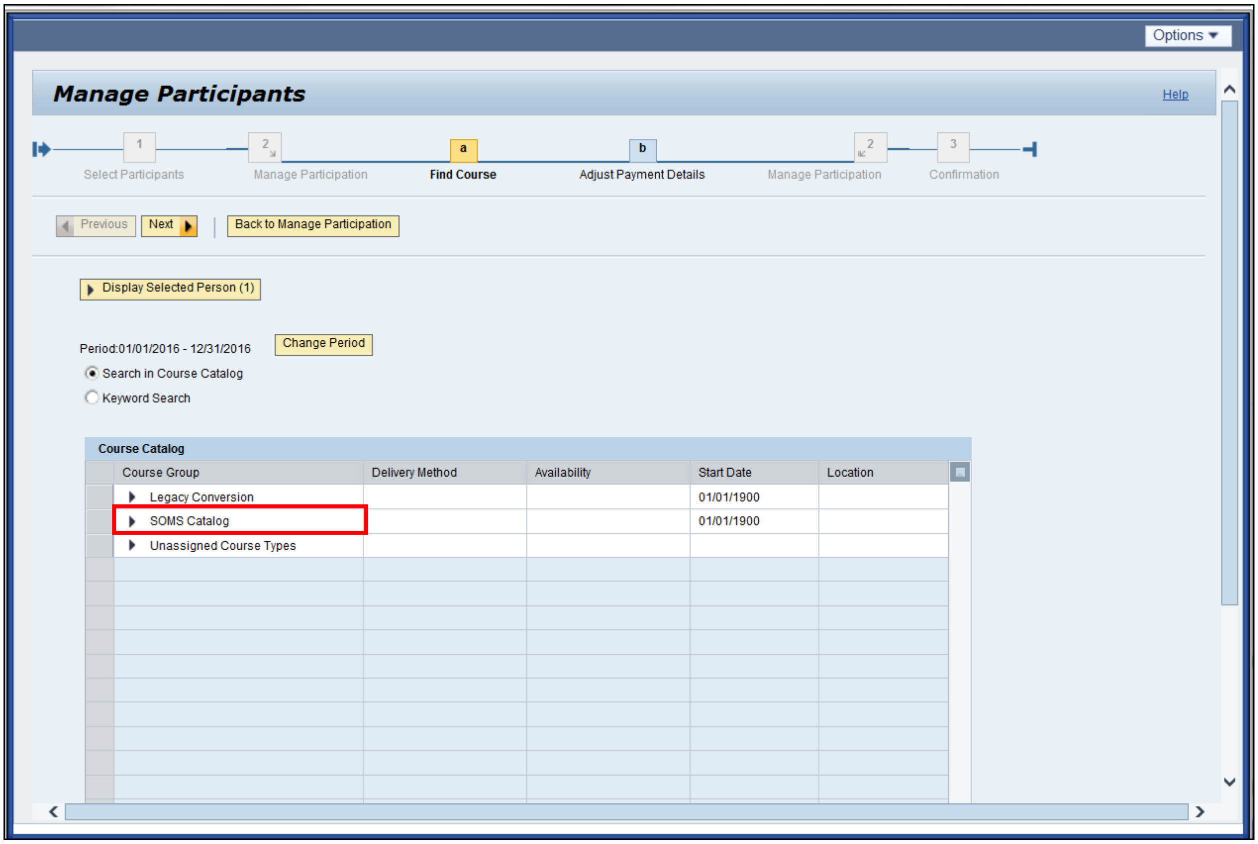
Your Action…	System Response…
2. Select **Participation**.	
3. Select **Manage Participants**.	The Manage Participants screen will appear.



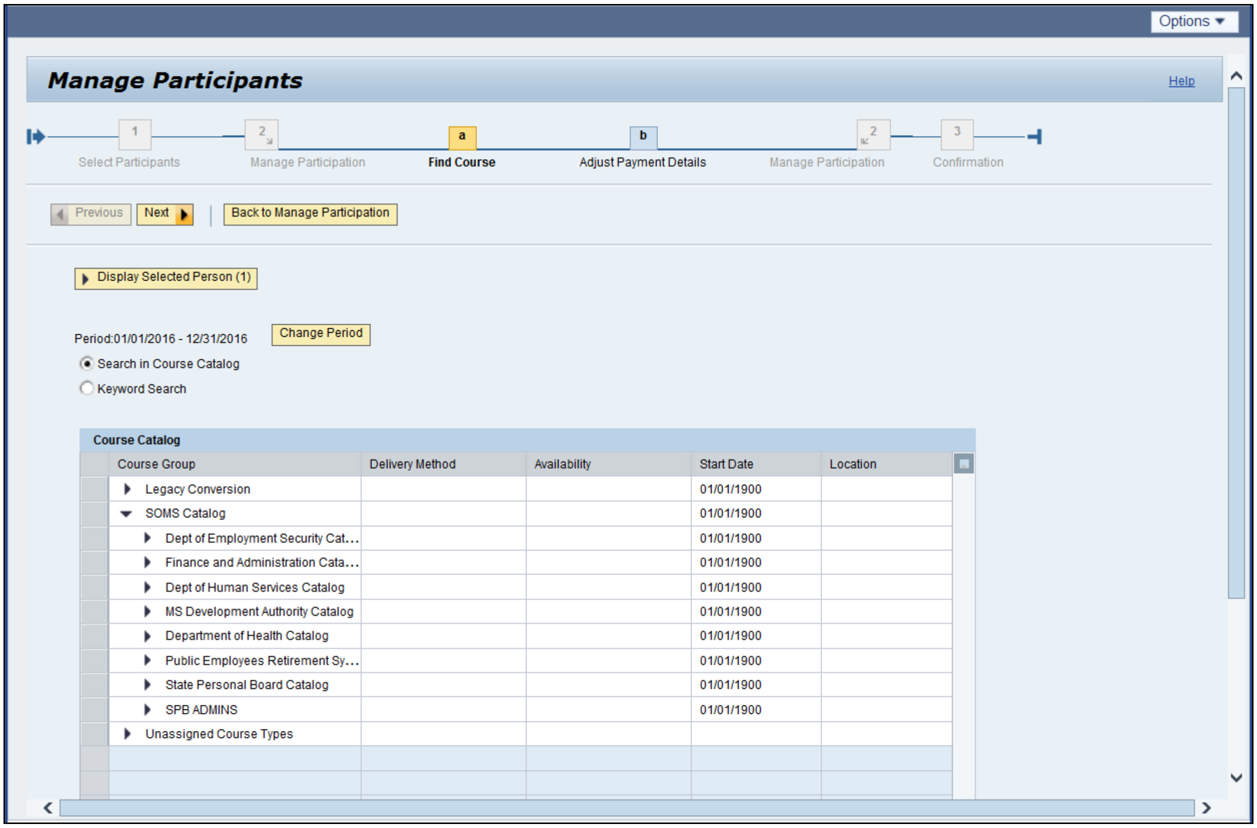
Your Action…	System Response…
4. Type your employee's last name in the **Find** box to search for the employee(s) you would like to book for a training course	
5. Select **Organizational Unit**, **Job**, **Position** or **Person** from the drop down menu under the **IN** space. **NOTE**: To enroll all of your employees, select organization unit number.	
6. Select **GO**.	The requested information will be returned.
7. Highlight the employee from the **"Available"** box and select the arrow to insert employee into the **"Selected"** box.	
8. Select **Next**.	



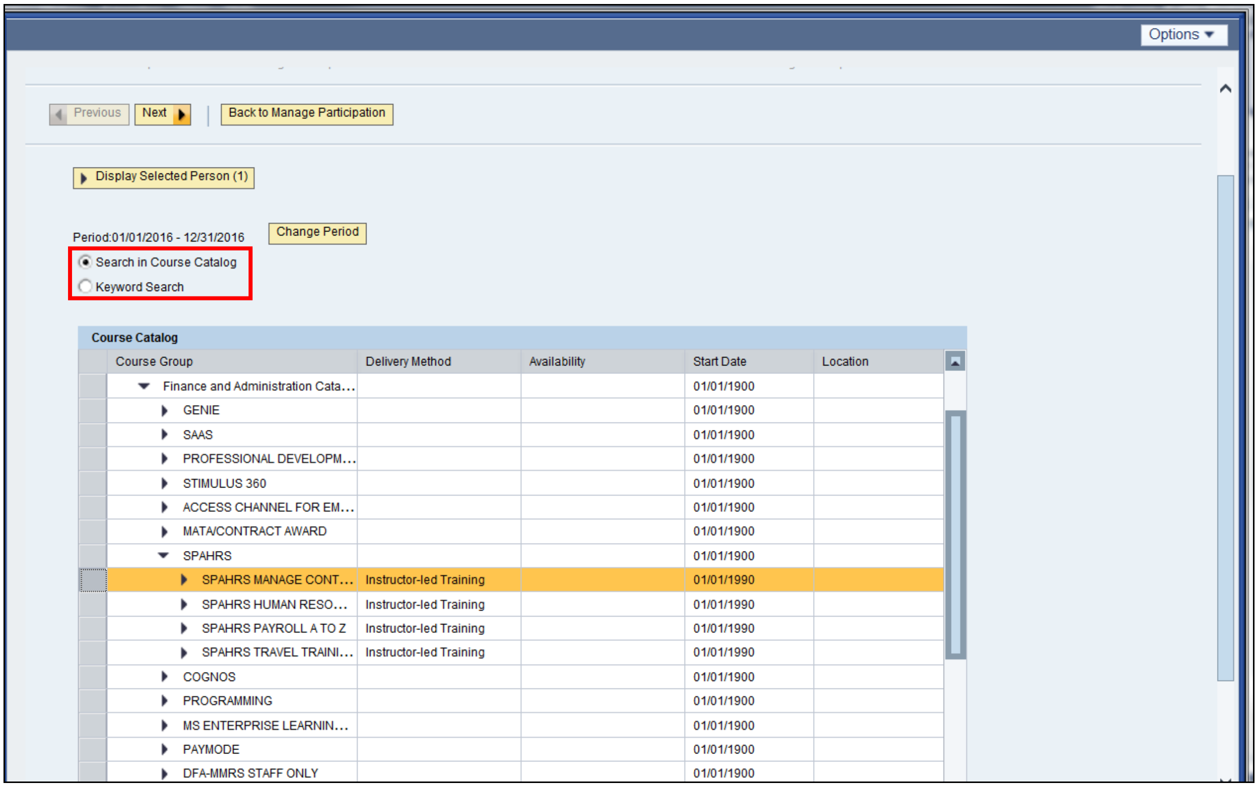
Your Action…	System Response…
9. Select the **Prebook Course for All**.	The course Catalog screen will appear.



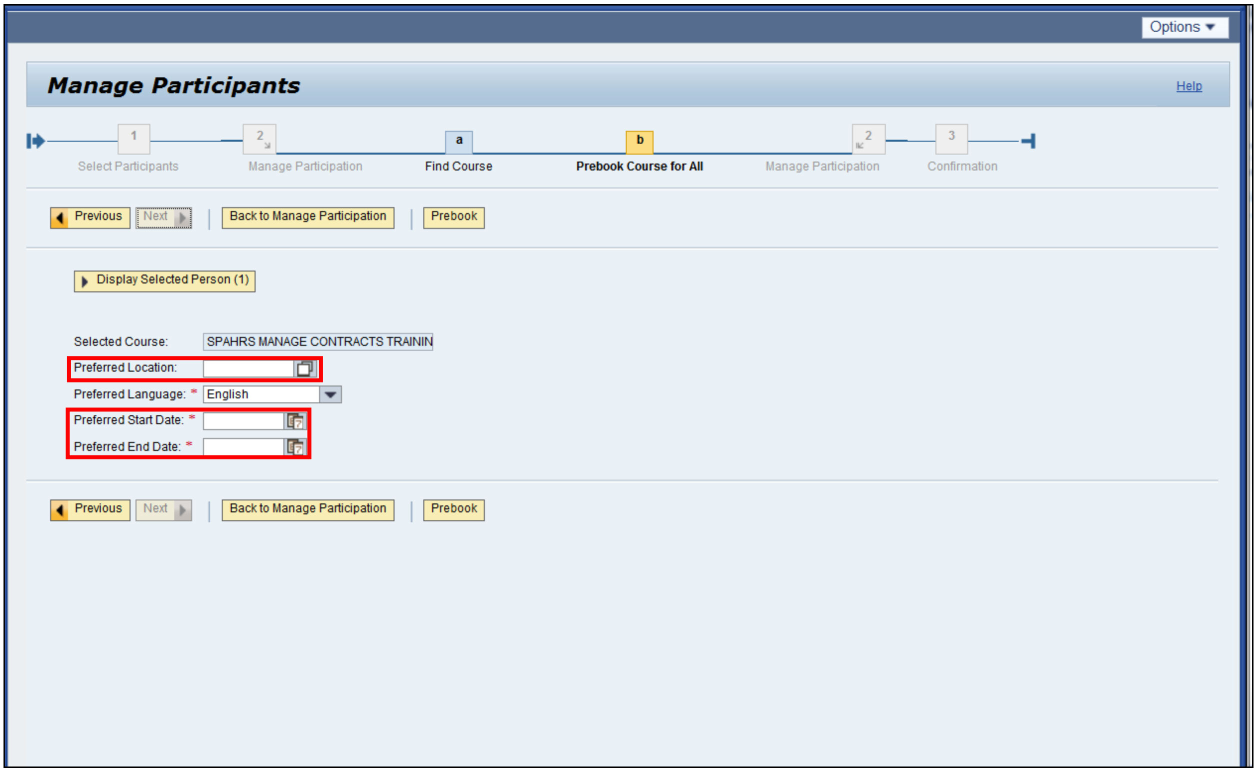
Your Action…	System Response…
10. Select the **SOMS Catalog**.	A list of agencies providing training will appear.



Your Action…	System Response…
11. Locate the agency providing the training course.	A list of training Course Groups will appear. Browse the Course Catalog for the course, or select the radio button for “Keyword Search.” The results of your search are displayed in a window on the same screen.



Your Action…	System Response…
12. Select the box next to the Course and training date you would like your employee(s) to attend.	The course is highlighted.
13. Select **Next**.	

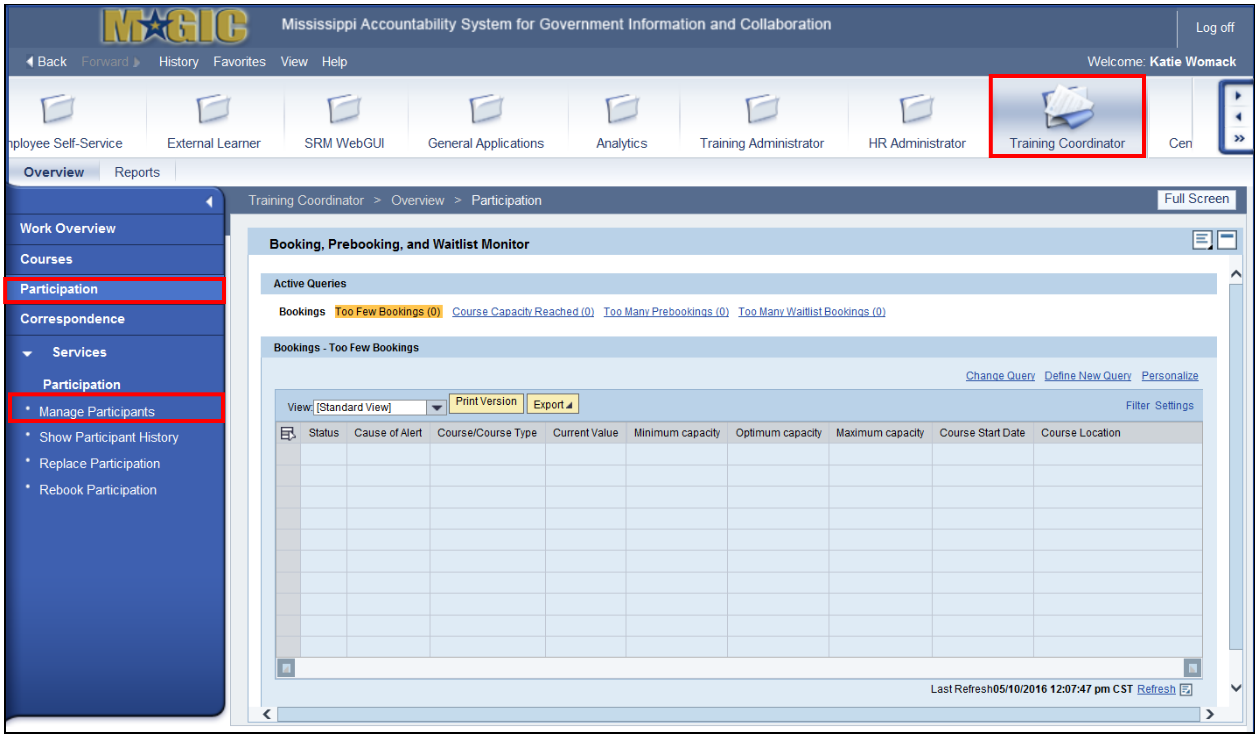


Your Action…	System Response…
14. Select [icon] by the **Preferred Location** in order to select the location for the employee to attend. This is not a required field.	
15. Select the **Preferred Start Date** and **Preferred End Date** to select the location and dates you would prefer for the employee.	
16. Select the **Prebook**.	"Participation prebooking was successful" message will appear at the top of the page.
17. Select **Next**.	The final confirmation screen appears.
18. Select **Close**.	

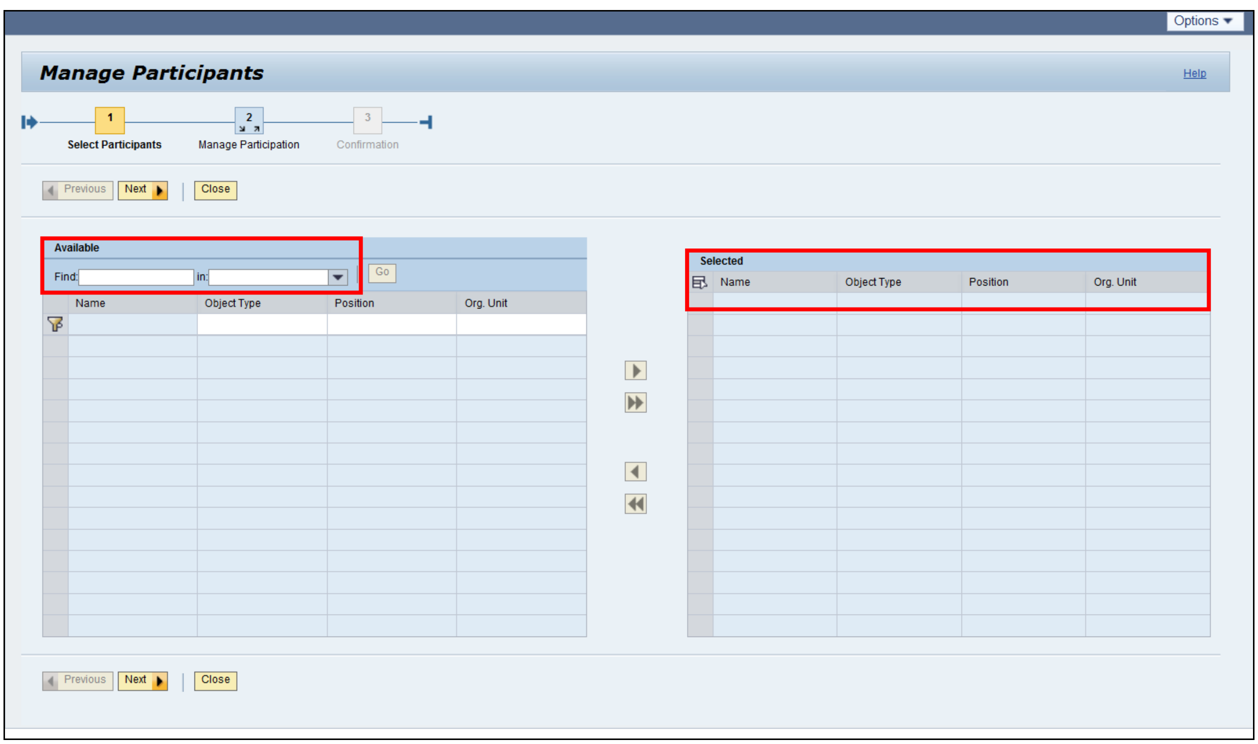
Canceling Course Bookings

As an Agency Training Coordinator, you can also use the "Manage Participation" function to cancel your employees from trainings.

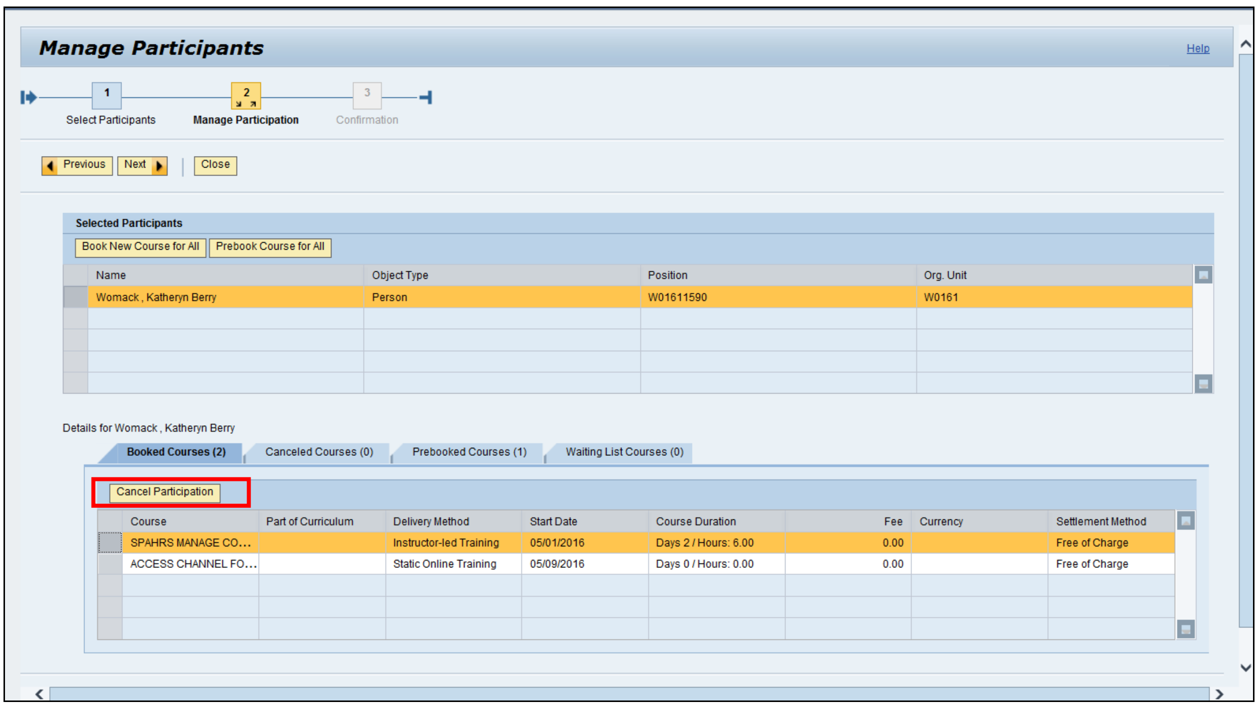
Your Action…	System Response…
1. Select the **Training Coordinator** tab.	The Work Overview screen appears.



Your Action…	System Response…
2. Select **Participation** tab	
3. Select **Manage Participants** tab.	

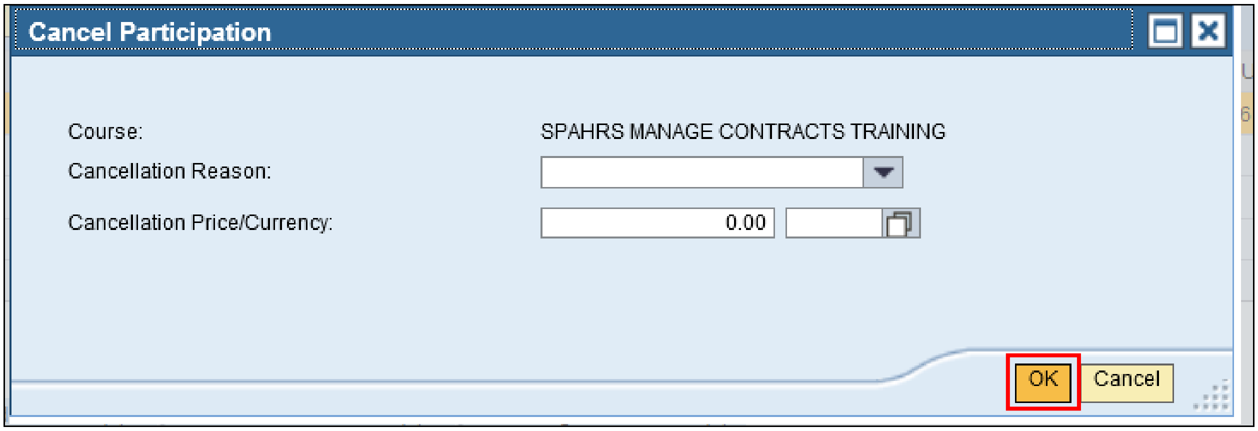


Your Action…	System Response…
4. Type your employee's last name in the **Find** box to search for the employee(s) you would like to cancel a training course.	
5. Select **Organizational Unit**, **Job**, **Position** or **Person** from the drop down menu under the **IN** space. If you'd like to cancel all of your direct reports, just place the first four digits of your org unit number followed by an asterisk (*) in the "Find" field and select your "Organizational Unit" from the drop-down menu.	
6. Select **GO**.	The requested information will be returned.
7. Highlight the employee from the **Available** box and select the arrow to insert employee into the **"Selected"** box.	
8. Select the **Next**.	



Your Action…	System Response…
9. Select the box next to the employee's name.	The name and information are highlighted, and the employee's current training activities will populate in the bottom box.
10. Select the box next to the course name.	The course is highlighted.

Your Action…	System Response…
11. Select the **Cancel Participation**.	A pop-up window will appear asking you to select a reason code for the cancellation.



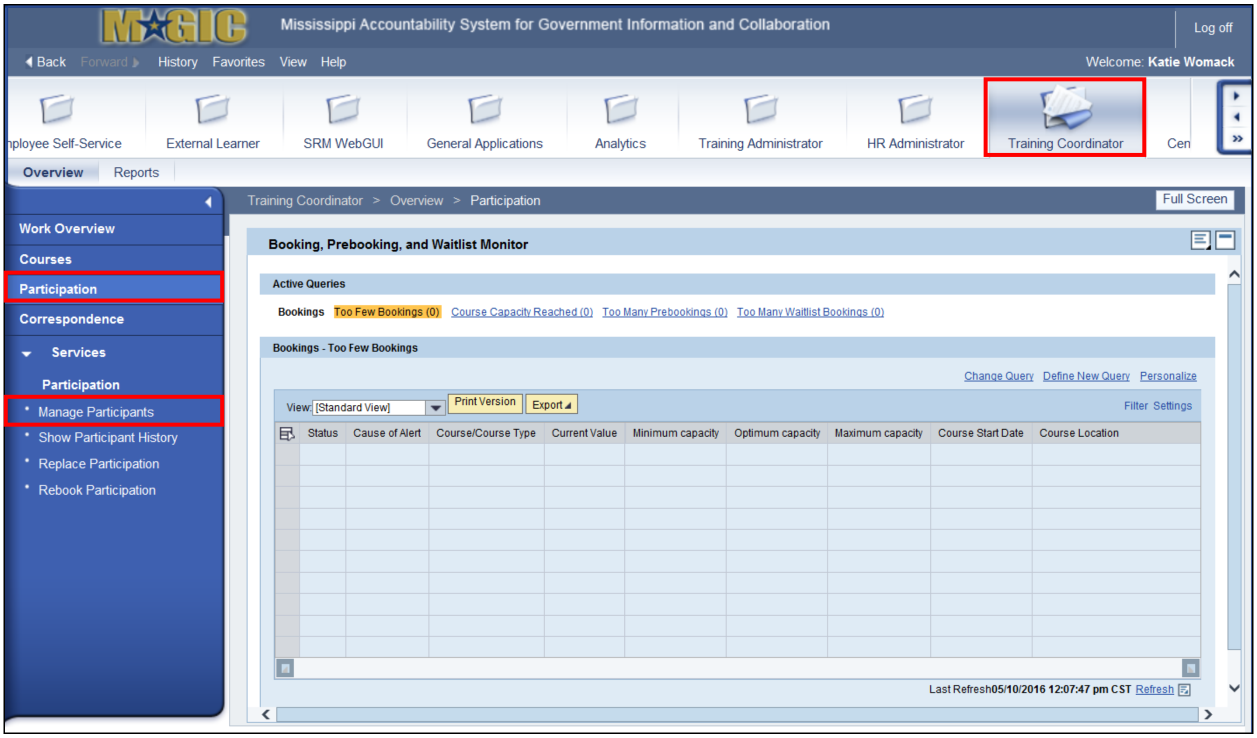
Your Action…	System Response…
12. From the drop down arrow select a cancellation reason.	
13. Select **OK.**	Participation cancelled message will appear at the top of the page.
14. Select **Next**.	The Confirmation page will appear.
15. Select **Close**	

Change or Cancel Course Prebookings

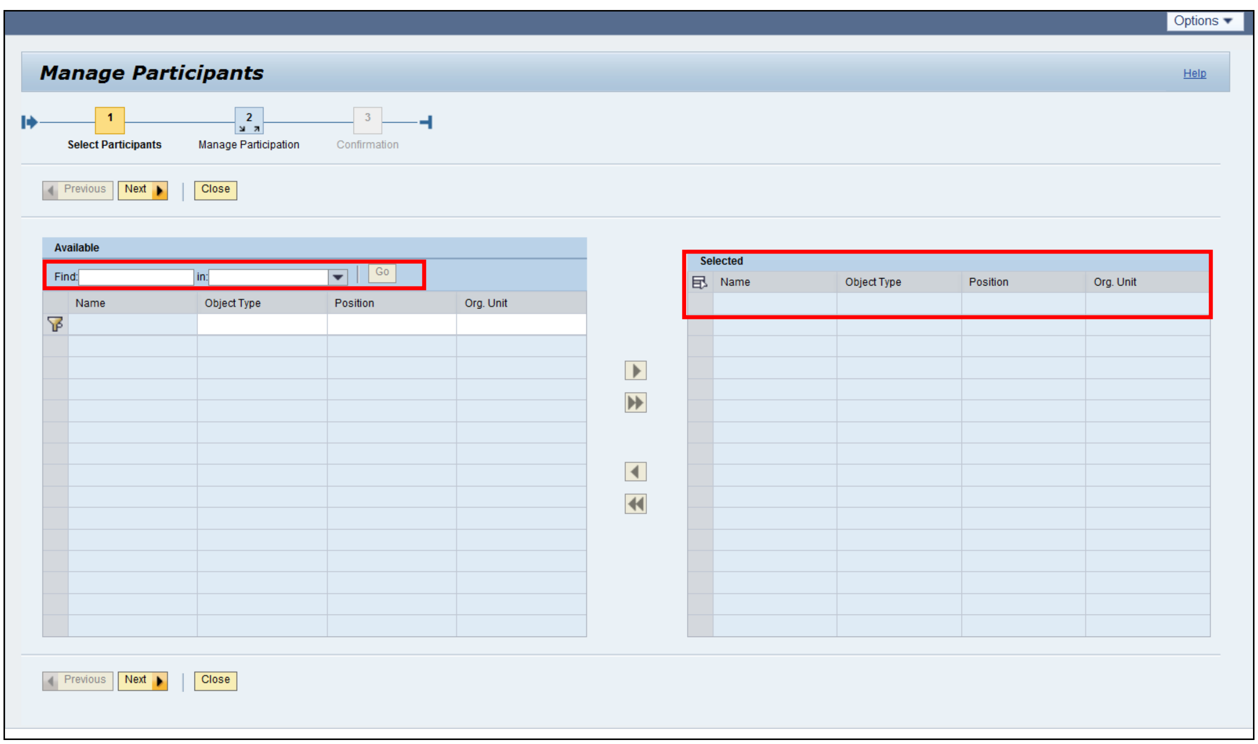
As Agency Training Coordinator, you can also use the "Manage Participation" function to change or cancel your employees from their prebookings or modify their existing prebookings with a new date or location.

Change Prebooking

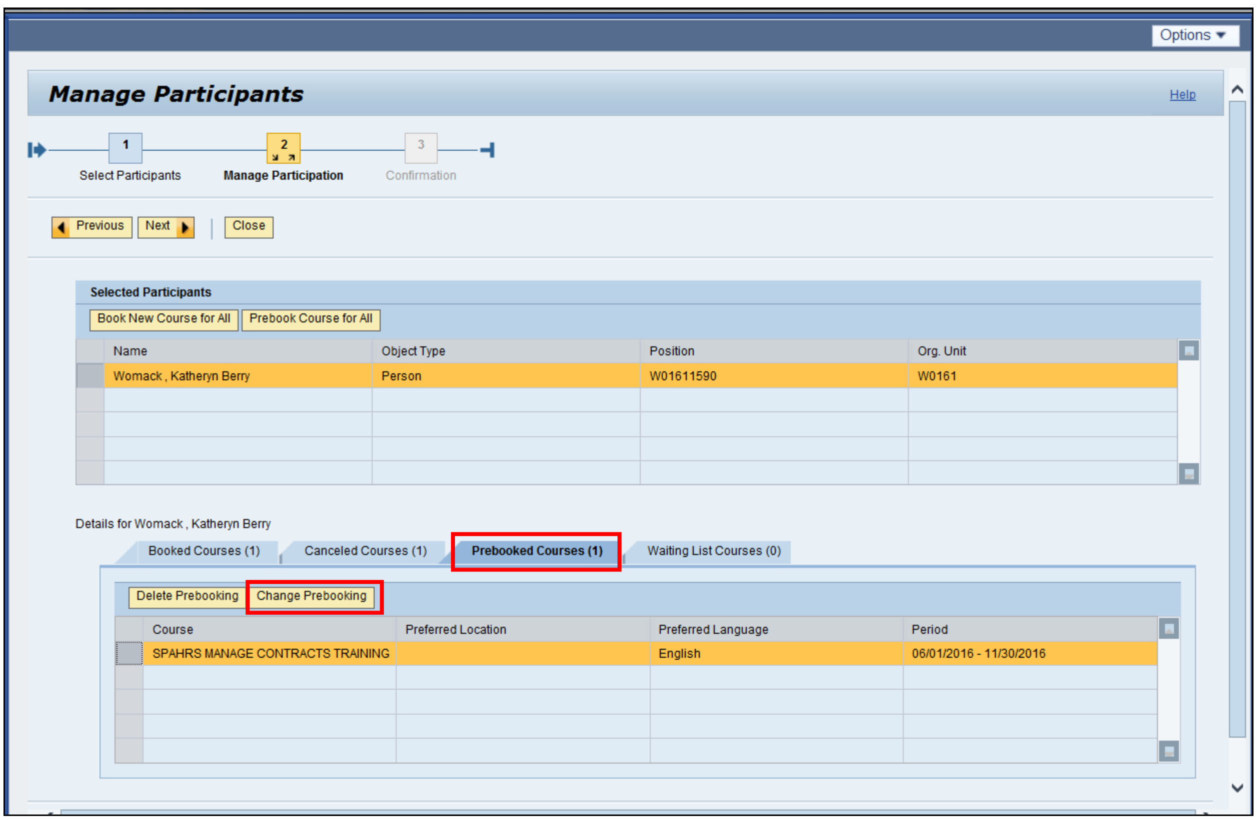
Your Action…	System Response…
1. Select the **Training Coordinator** tab.	The Work Overview screen appears.



Your Action…	System Response…
2. Select **Participation** tab	
3. Select **Manage Participants** tab.	

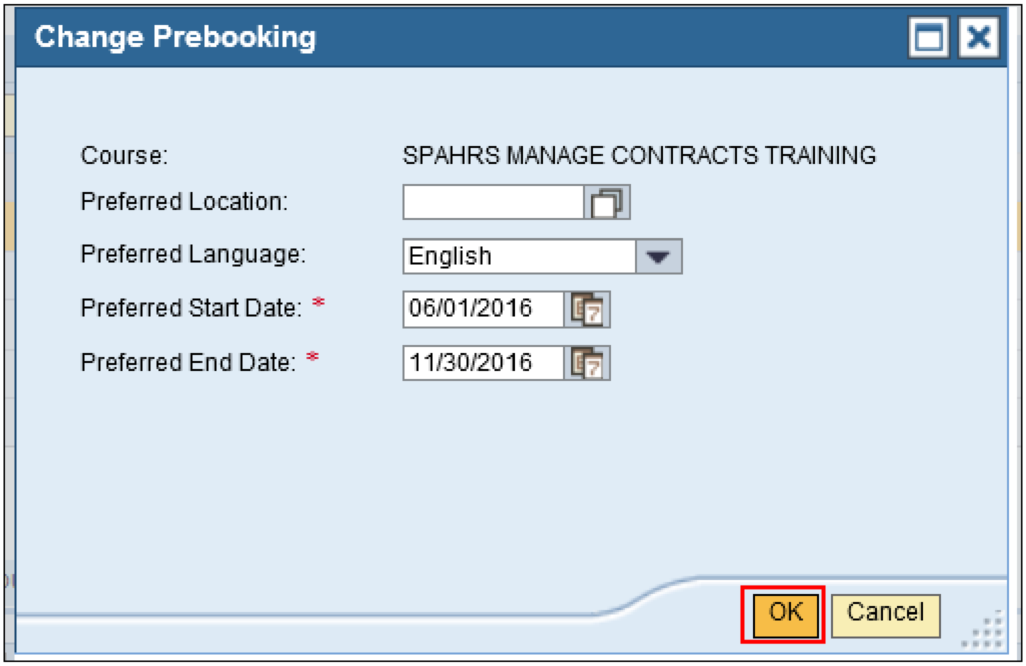


Your Action…	System Response…
4. Type your employee's last name in the **Find** box to search for the employee(s) for which you would like to change a prebooking training course.	
5. Select **Organizational Unit**, **Job**, **Position** or **Person** from the drop down menu under the **IN** space. If you'd like to change all of your direct reports, just place the first 4 digits of your org unit number and an asterisk (*) in the "Find" field and select "Organizational Unit" from the drop-down menu.	
6. Select **GO**.	The requested information will be returned.
7. Highlight the employee from the **Available** box and select the arrow to insert employee into the **"Selected"** box.	
8. Select the **Next**.	



Your Action…	System Response…
9. Select the box next to the employee's name.	The name and information is highlighted and the employee's current training activities will populate in the bottom box.

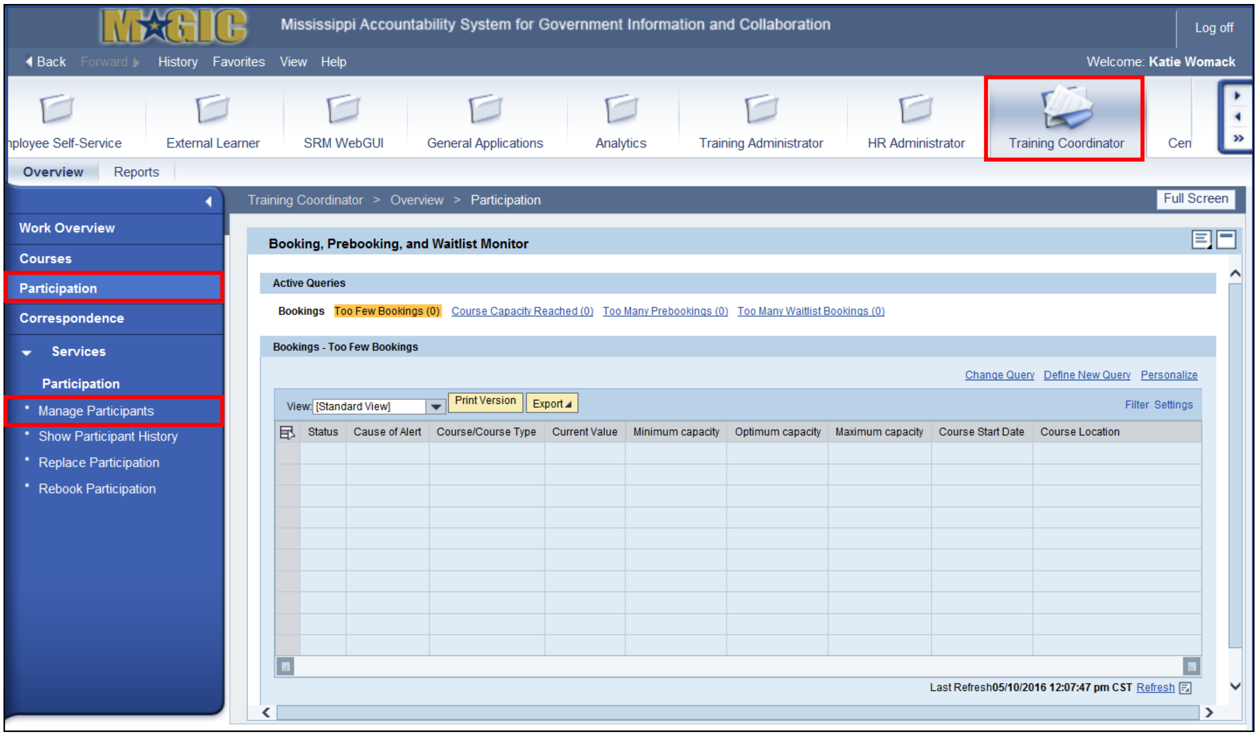
Your Action…	System Response…
10. Select the **Prebooked Course** tab.	
11. Select the box next to the course name.	The course is highlighted.
12. Select the **Change Prebooking** button to modify.	The Change Prebooking window will appear which gives you the option of changing the Preferred Location, Preferred Start and End Date.



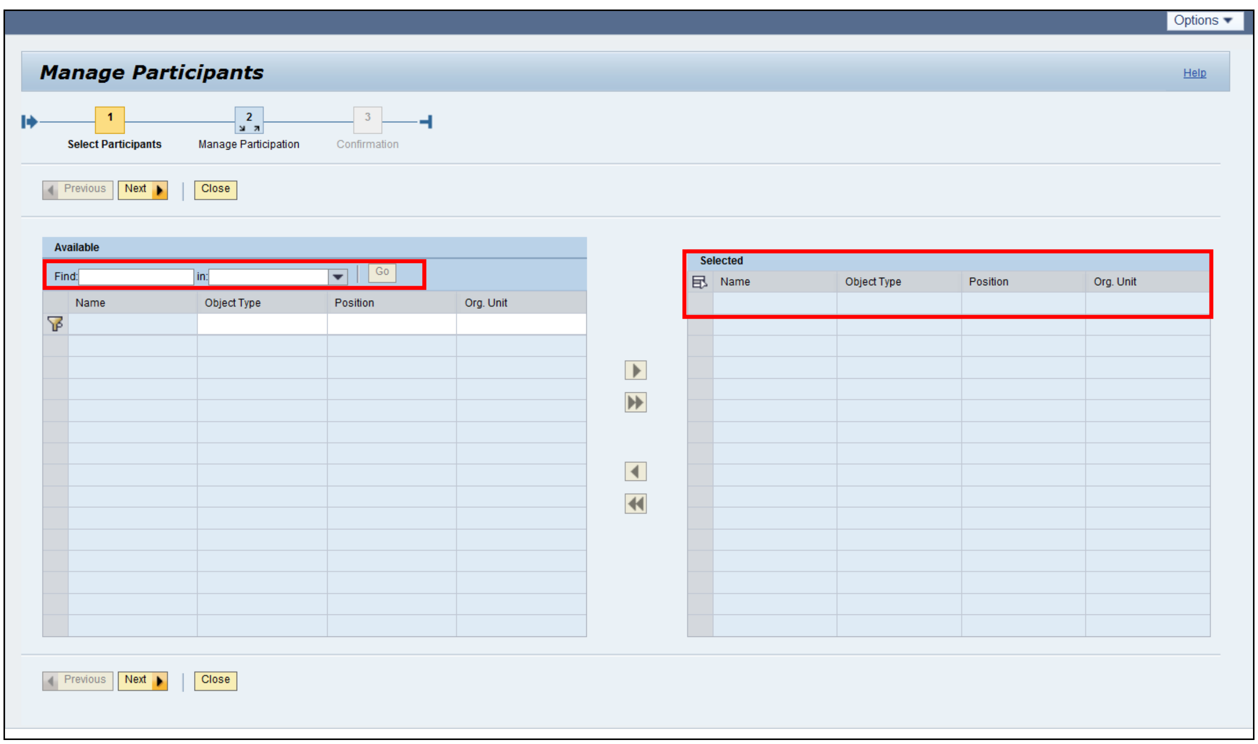
Your Action…	System Response…
13. Select by the **Preferred Location** in order to select the location for the employee to attend. This is not a required field.	
14. Select the **Preferred Start Date**, and **Preferred End Date** to select the location and dates you would prefer for the employee.	
15. Select **OK.**	The prebooking data has been changed message will appear at the top of the page.
16. Select **Next.**	The final confirmation screen will appear.
17. Select **Close.**	

Cancel Prebooking

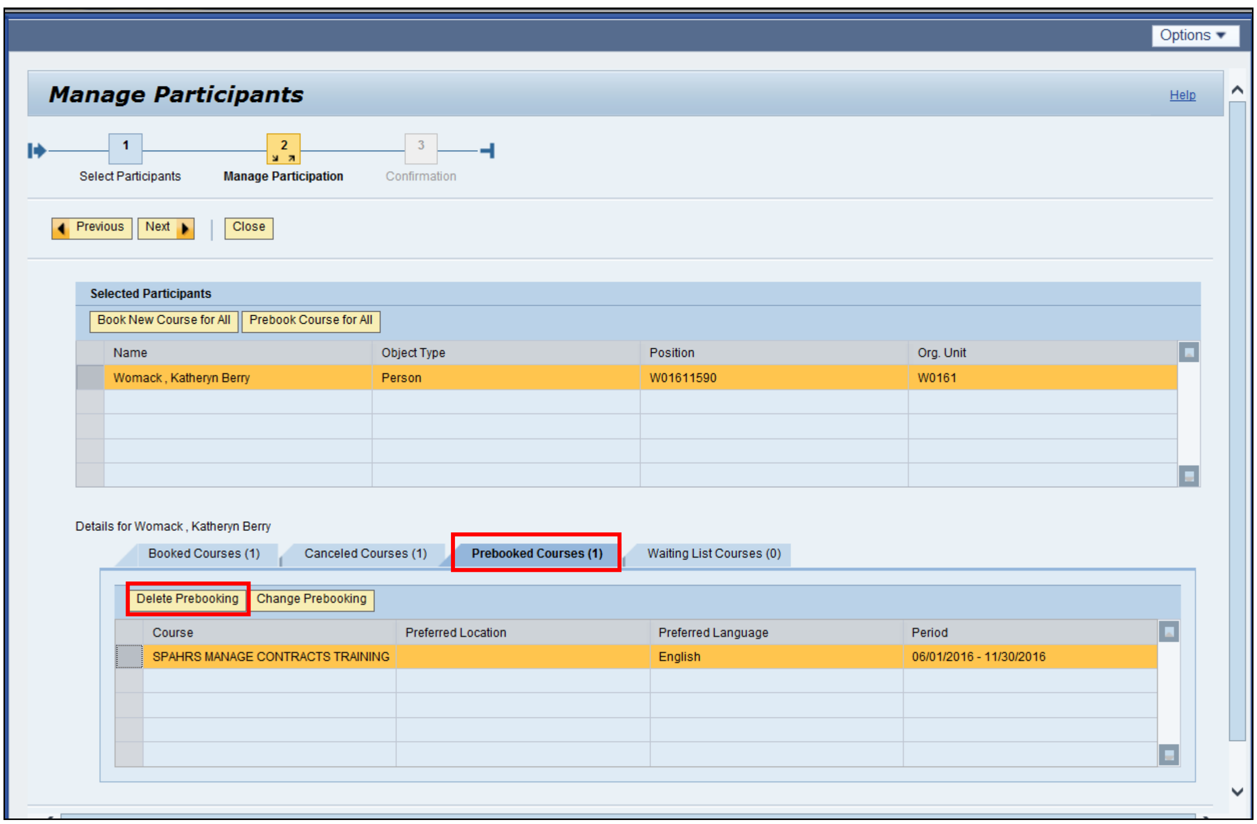
Your Action…	System Response…
1. Select the **Training Coordinator** tab.	The Work Overview screen appears.



Your Action…	System Response…
2. Select **Participation** tab	
3. Select **Manage Participants** tab.	

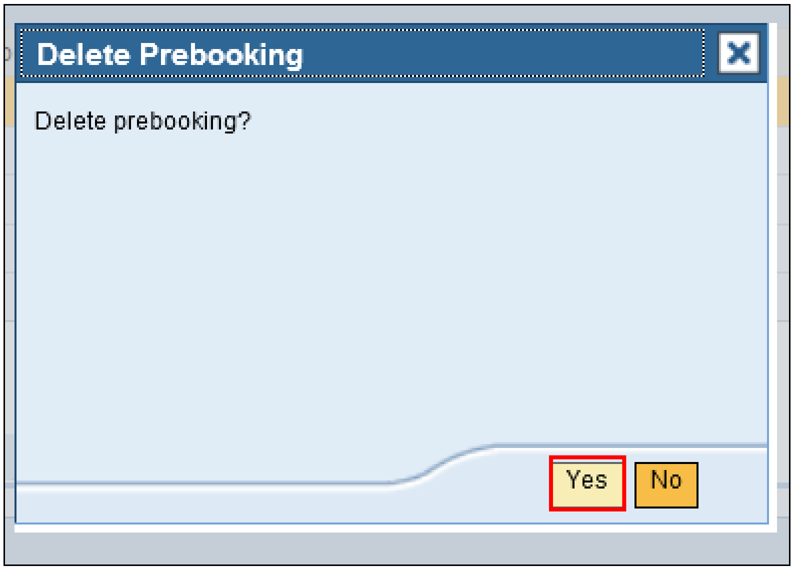


Your Action…	System Response…
4. Type your employee's last name in the **Find** box to search for the employee(s) you would like to cancel a prebooking training course.	
5. Select **Organizational Unit**, **Job**, **Position** or **Person** from the drop down menu under the **IN** space. If you'd like to cancel all of your direct reports, just place the first 4 digits of your org unit number and an asterisk (*) in the "Find" field and select "Organizational Unit" from the drop-down menu.	
6. Select **GO**.	The requested information will be returned.
7. Highlight the employee from the **Available** box and select the arrow to insert employee into the **"Selected"** box.	
8. Select the **Next**.	



Your Action…	System Response…
9. Select the box next to the employee's name.	The name and information is highlighted, and the employee's current training activities will populate in the bottom box.

Your Action…	System Response…
10. Select the **Prebooked Course** tab.	
11. Select the box next to the course name.	The course is highlighted.
12. Select the **Delete Prebooking**.	A Delete Prebooking window will appear.



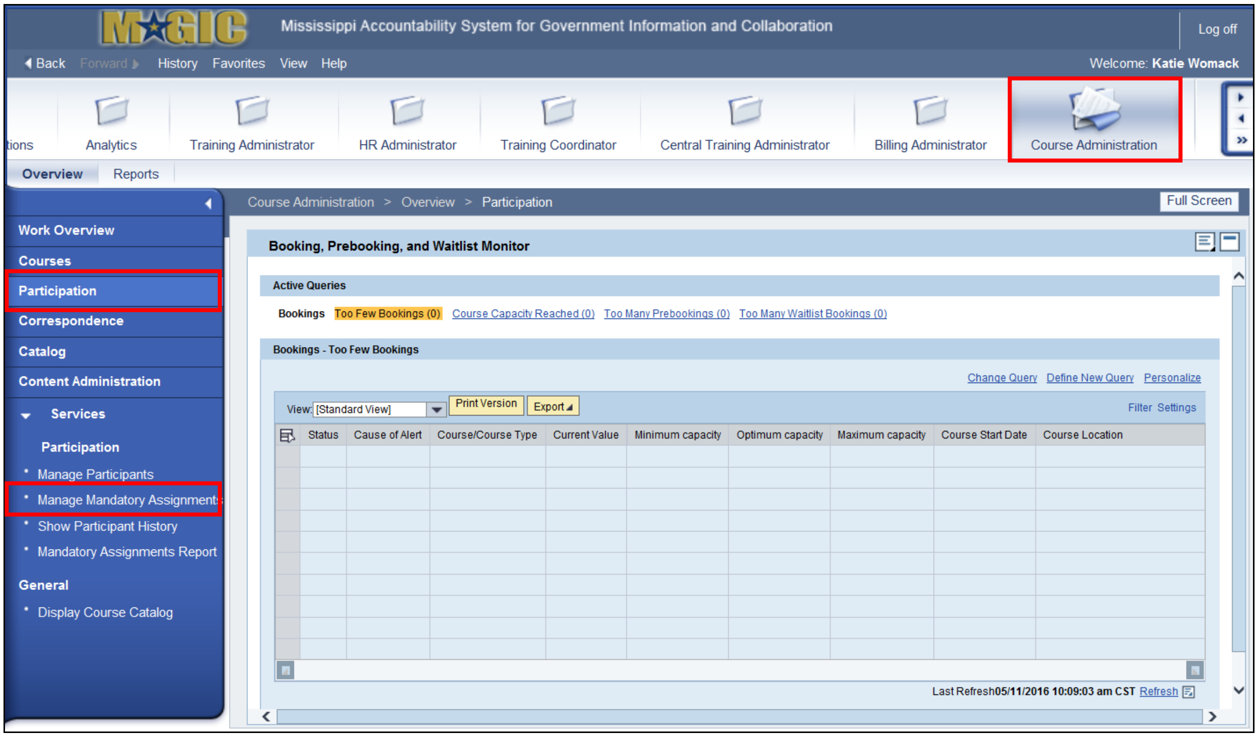
Your Action…	System Response…
13. Select **Yes.**	The prebooking has been deleted message will appear at the top of the page.
14. Select **Next.**	The final confirmation screen will appear.
15. Select **Close.**	

Course Assignments

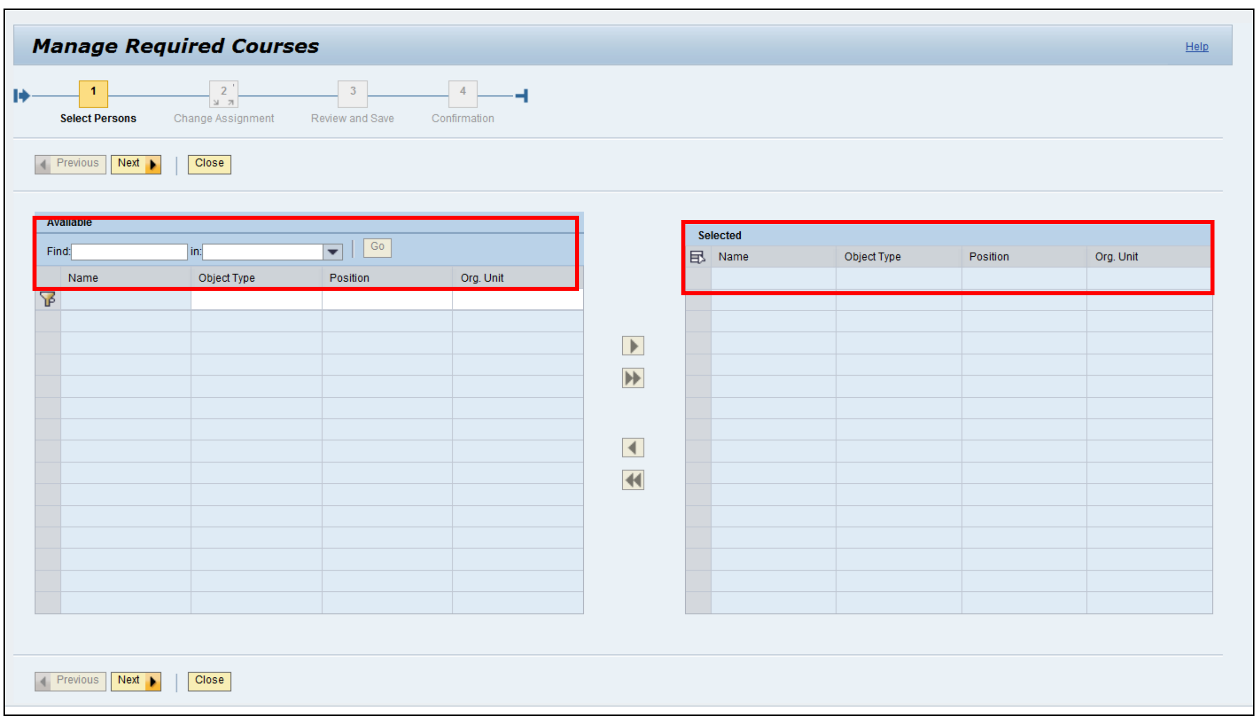
A Course Assignment does not book your employees into a course; it merely places the course in their Messages and Notes section telling them to book the first available session of the training.

Course Assignments are a way to tell your employees they need to book a course or there is training that is strongly recommended for them to attend.

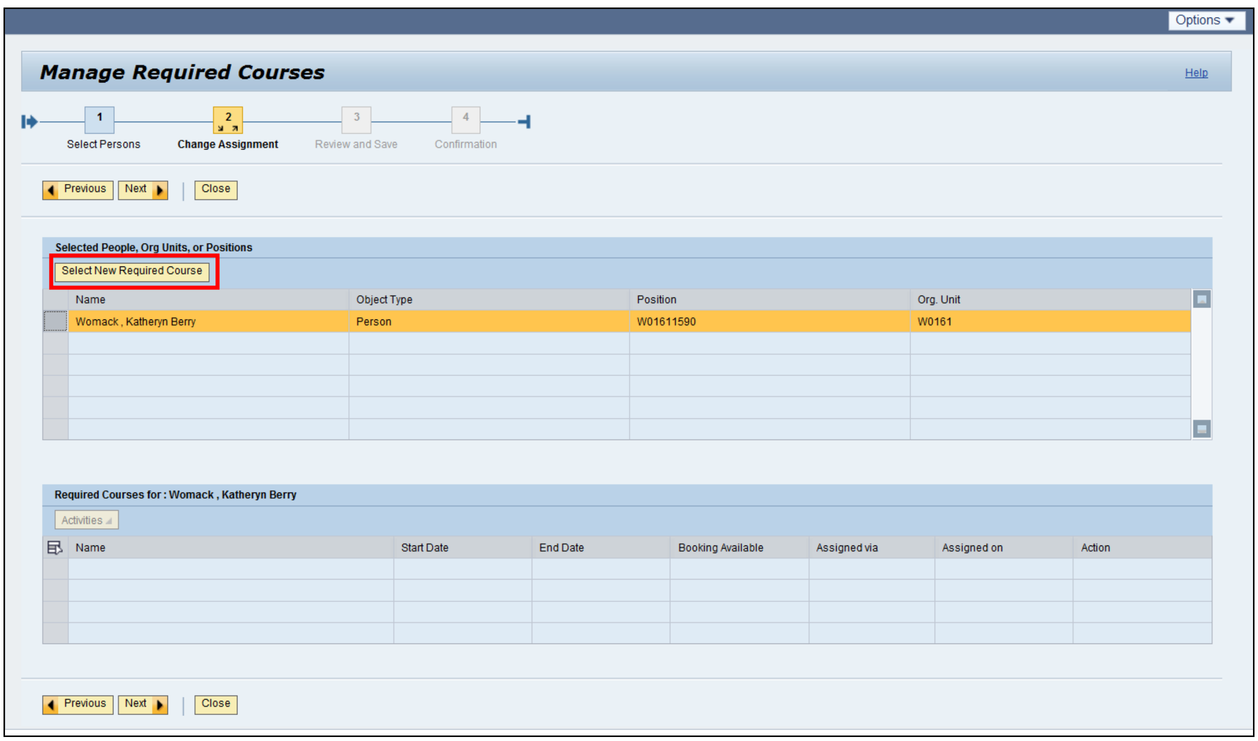
Your Action…	System Response…
1. Select the **Course Administration** tab.	



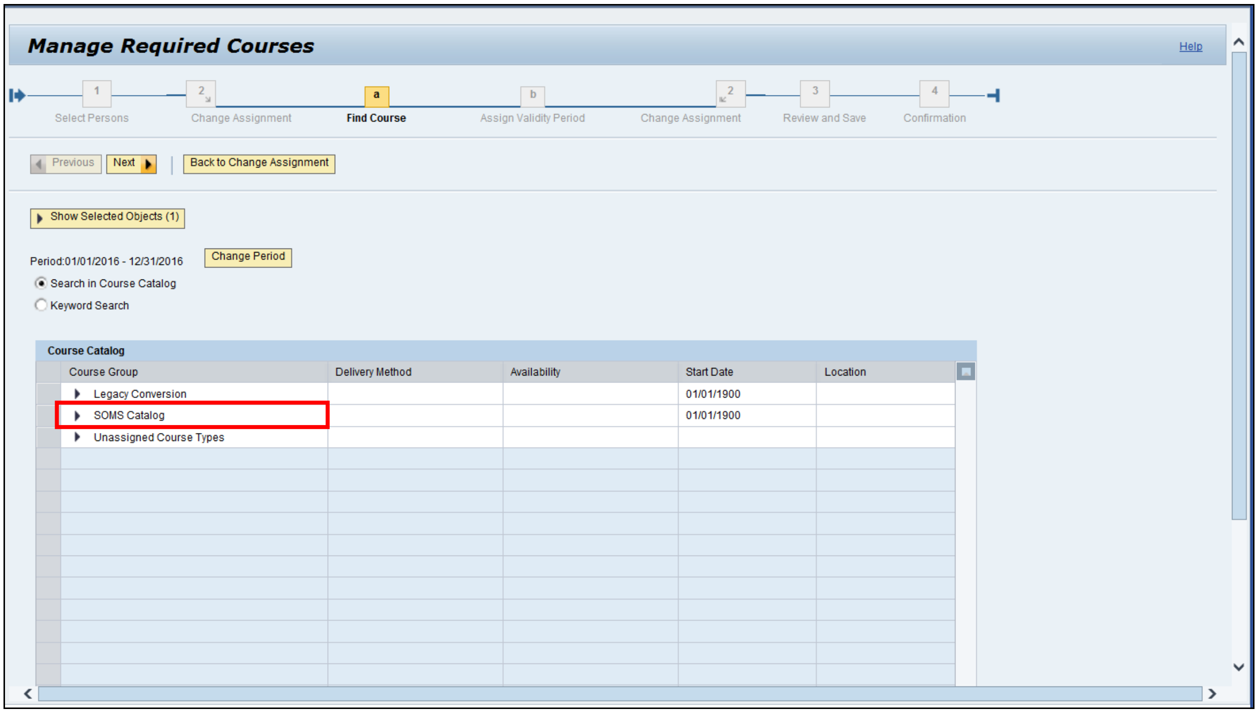
Your Action…	System Response…
2. Select the **Participation** link.	
3. Select the **Manage Mandatory Assignment** link.	The Manage Required Course screen will appear.



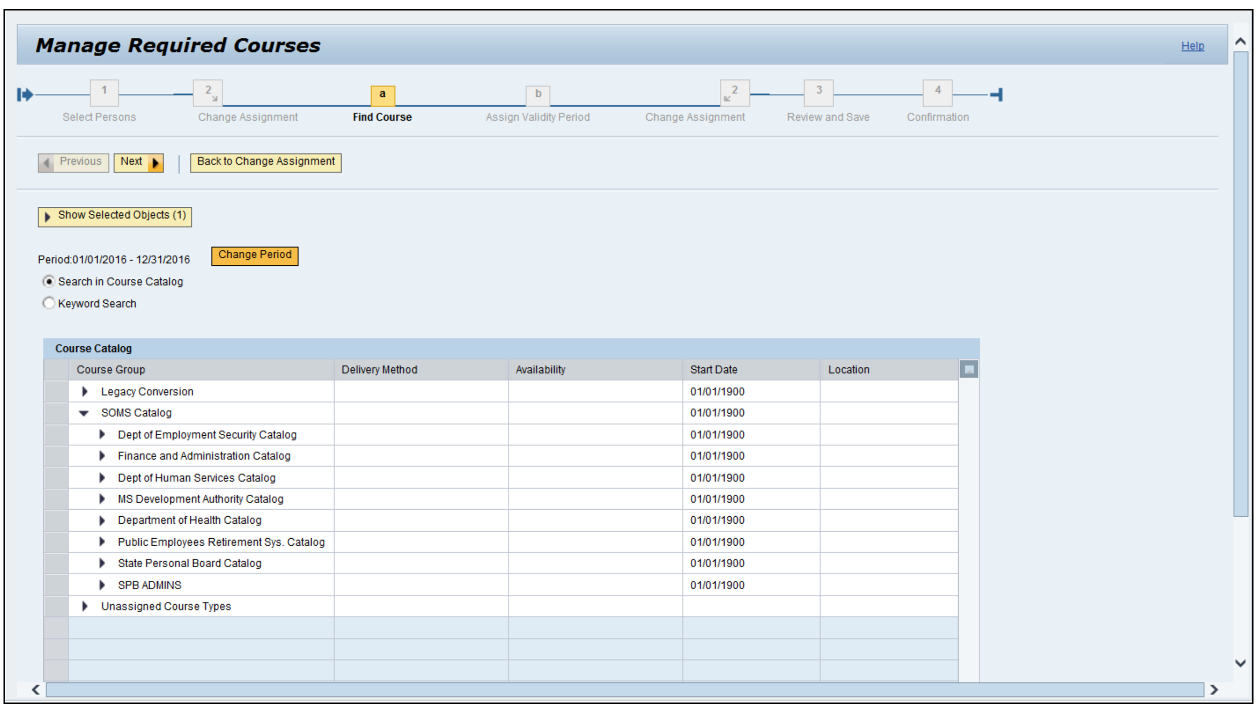
Your Action…	System Response…
4. Type your employee's last name in the Find box to search for the employee(s) you would like to manage a required training course.	
5. Select Organizational Unit, Job, Position or Person from the drop down menu under the IN space. If you'd like to manage required training for all of your direct reports, just place the first 4 digits of your org unit number and an asterisk (*) in the "Find" field and select "Organizational Unit" from the drop-down menu.	
6. Select **GO**.	The requested information will be returned.
7. Highlight the employee from the Available box and select the arrow to insert employee into the "Selected" box.	
8. Select **Next**.	
9. Select the box next to the employee's name.	The name and information are highlighted.



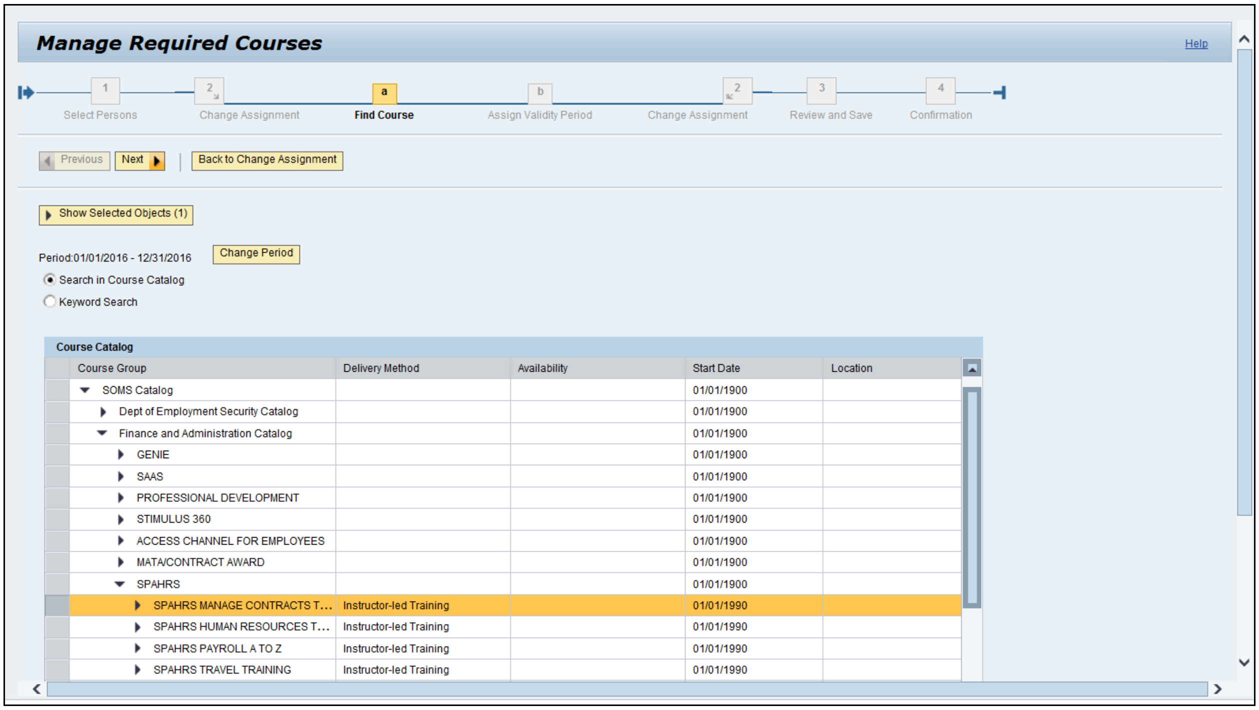
Your Action…	System Response…
10. Select the **Select New Required Course** button.	The Course Catalog screen will appear.



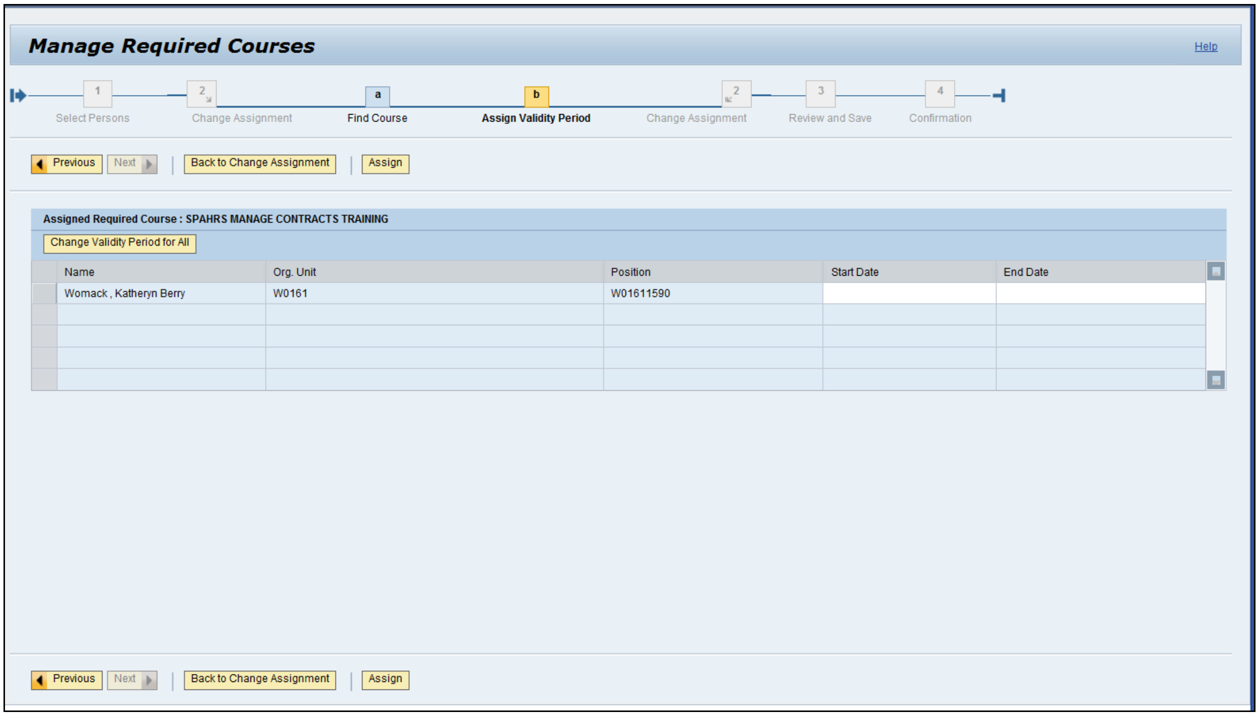
Your Action…	System Response…
11. Select the **SOMS Catalog**.	A list of agencies providing training will appear.



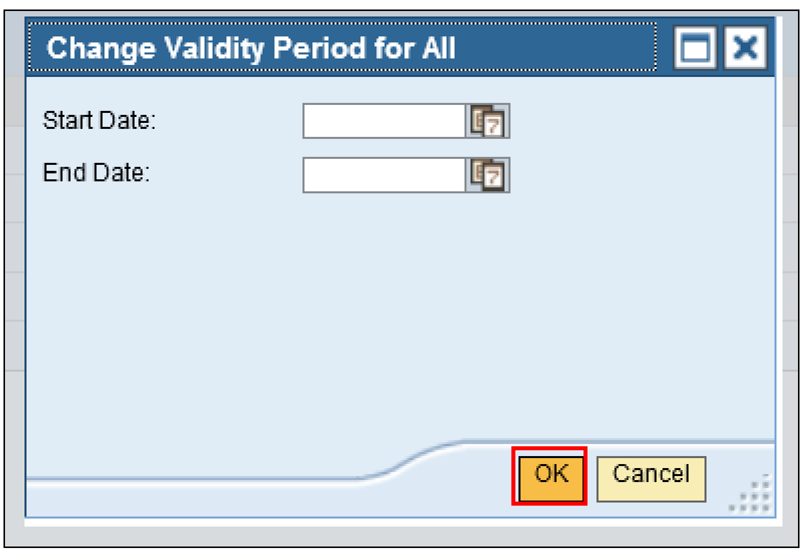
Your Action…	System Response…
12. Locate the agency providing the training course.	A list of training Course Groups will appear. Browse the Course Catalog for the course, or select the radio button for “Keyword Search.” The results of your search are displayed in a window on the same screen.



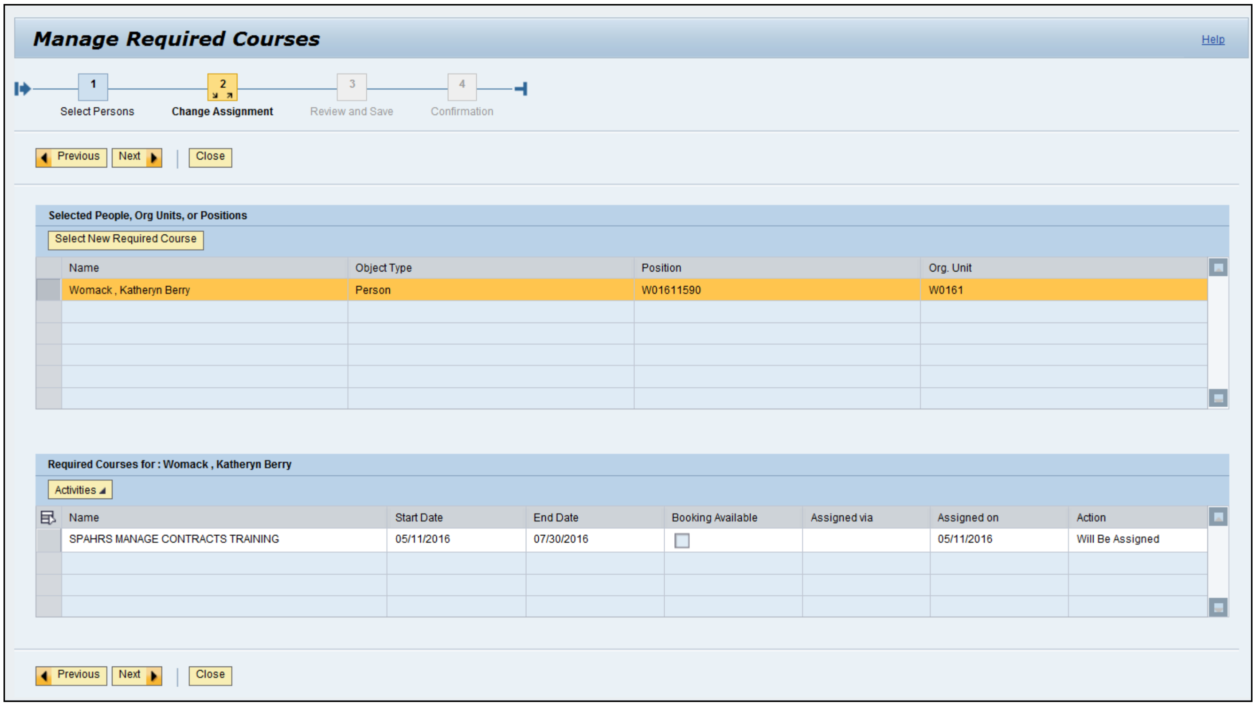
Your Action…	System Response…
13. Select the box next to the name of the training **Course Type** to be assigned.	The course is highlighted.
14. Select **Next**.	The assignment screen will appear.



Your Action…	System Response…
15. Select the **Change Validity Period for All** button.	The Change Validity Period for All window will appear.



Your Action…	System Response…
16. Select the **State and End Date**.	
17. Select **OK.**	
18. Select **Assign**.	A summary screen will appear.

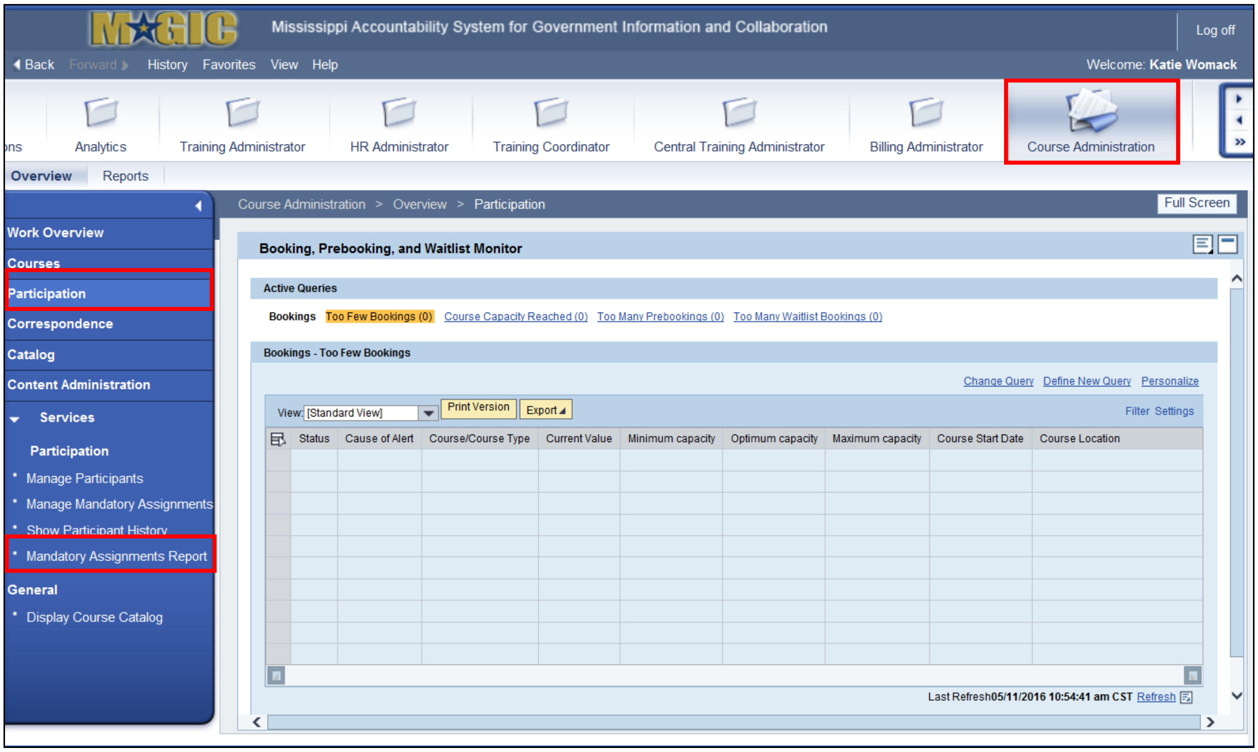


Your Action…	System Response…
19. Select **Next**.	
20. Select **Next.**	The activity was completed successfully message will appear at the top of the page.
21. Select **Close.**	

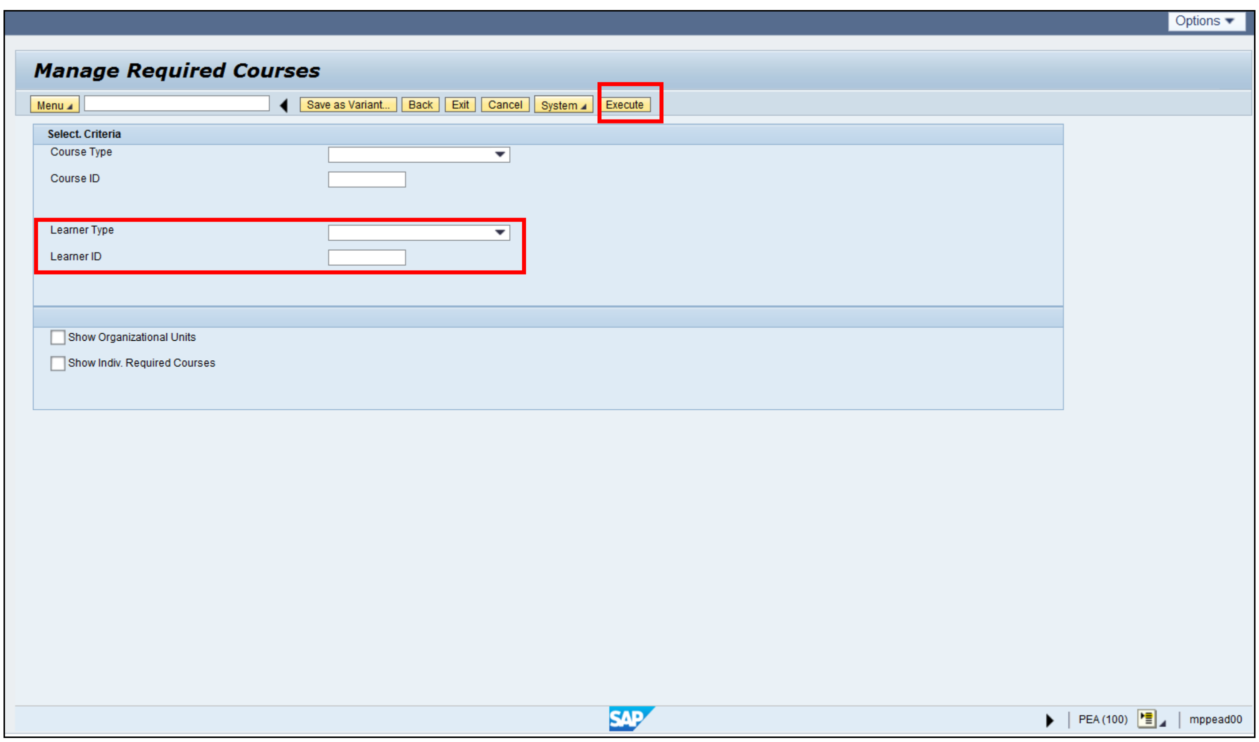
Mandatory Assignments Report

As well as making mandatory course assignments to your employees, you can also run a brief report to check on their progress.

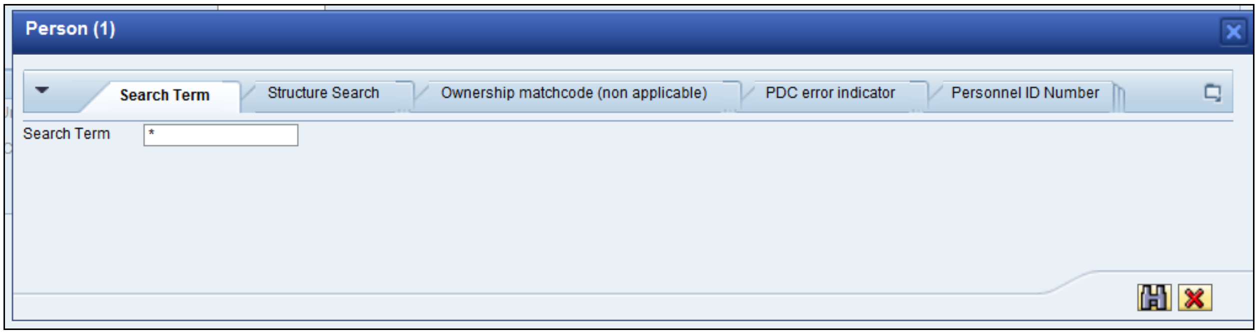
Your Action…	System Response…
1. Select the **Course Administration** tab.	



Your Action…	System Response…
2. Select the **Participation** link.	
3. Select the **Mandatory Assignment Report** link.	The Manage Required Course screen will appear.



Your Action…	System Response…
4. Select **P Person** from **Learner Type** drop down box.	
5. Select the beside the **Learner ID** field.	The Person search screen will appear.

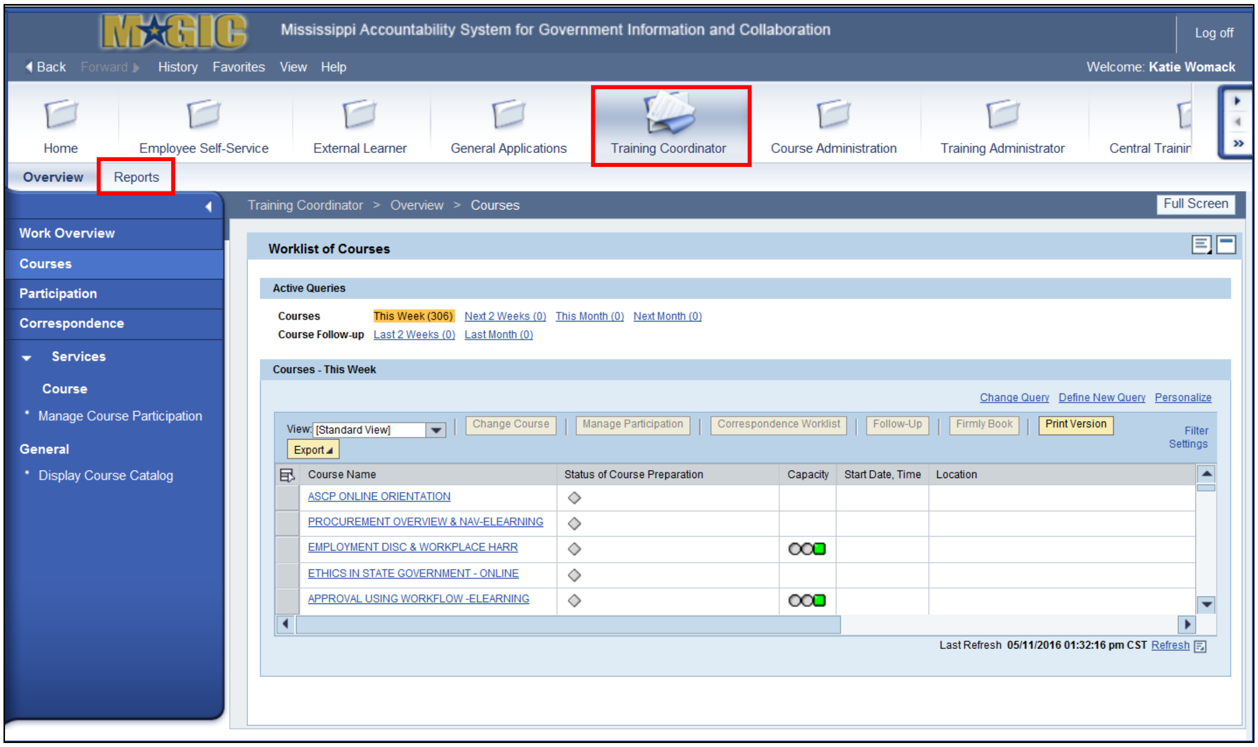


Your Action…	System Response…
6. Enter the employee's last name in the search field.	
7. Select the .	The search results will appear.
8. Select the employee's name.	The row is highlighted.
9. Select the to confirm your selection.	The Learner ID field populates with the employee's personnel number.
10. Select **Execute.**	The resulting report will show you the employee's mandatory assignments and whether they have booked or completed them.

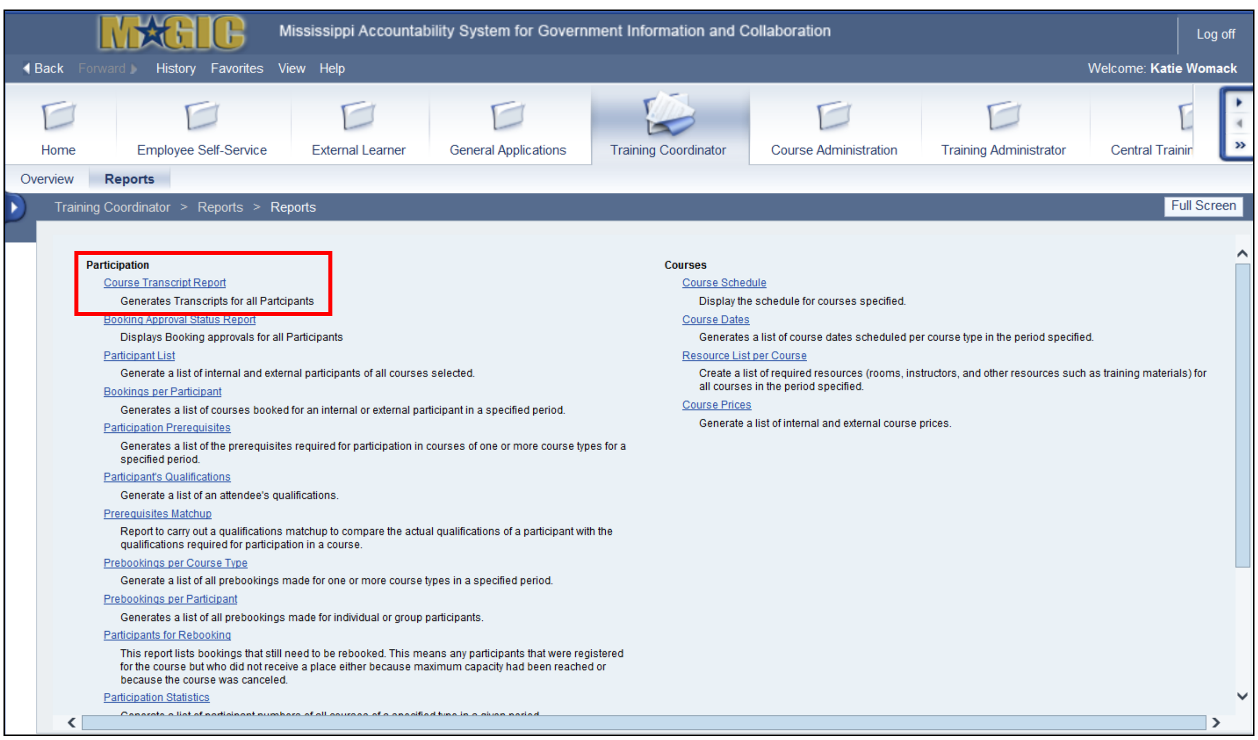
Employee Training Transcript

As the Agency Training Coordinator, you can run your employee's training transcript at any time.

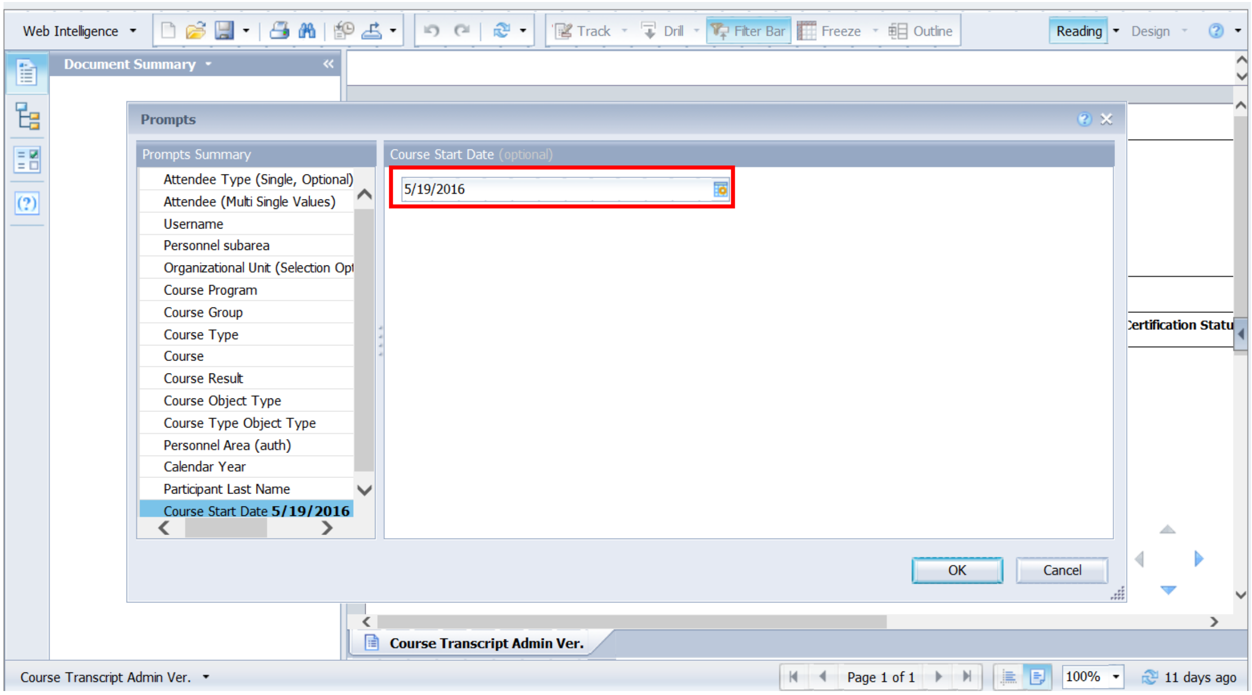
Your Action…	System Response…
1. Select the **Training Coordinator** tab.	The Work Overview screen appears.



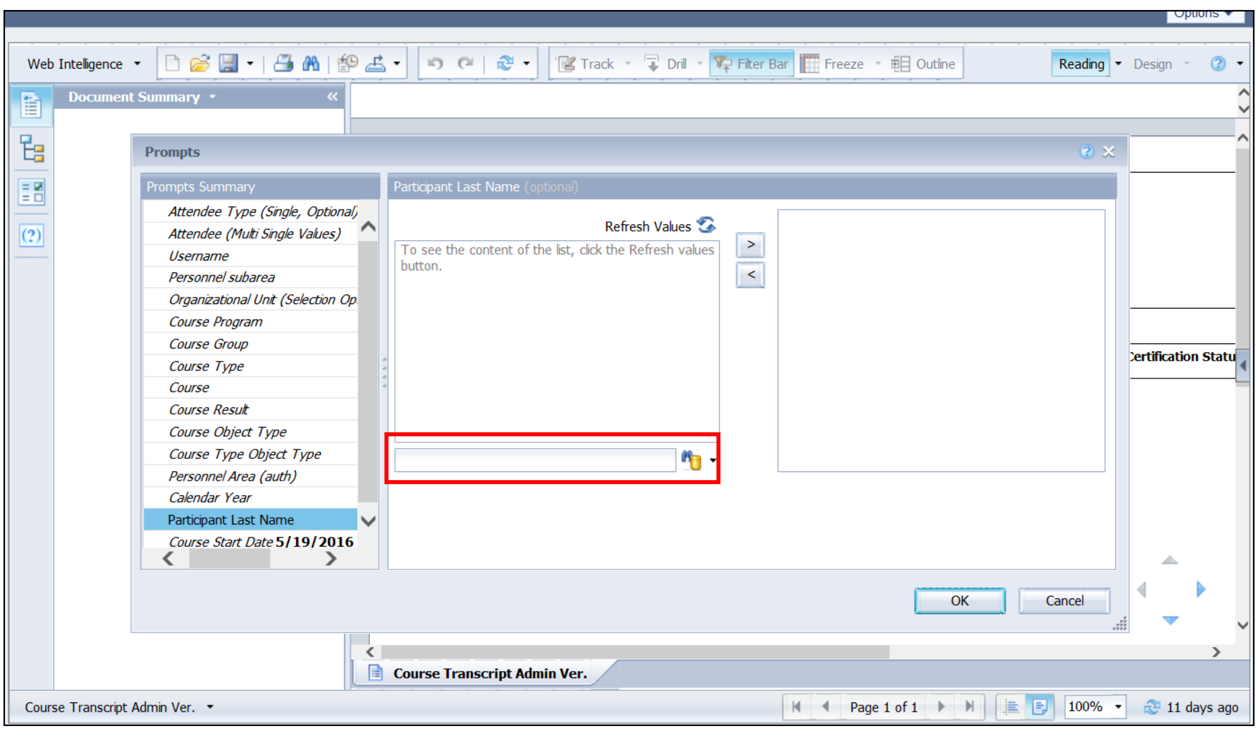
Your Action…	System Response…
2. Select the **Reports** tab.	A listing of reports will appear.



Your Action…	System Response…
3. Select the **Course Transcript Report** link.	The Prompts screen will appear.



Your Action…	System Response…
4. Select the **Course Start Date** and enter the current date.	



Your Action…	System Response…
5. Select the **Participant Last Name** and enter the employee's last name *in all capital letters.*	
6. Select  to search for the employee.	The employee's last name appears in the left hand box.
7. Press  to move the name to the box on the right.	
8. Select **OK.**	The transcript appears for all people with the same last name.